CANADIAN TV VIEWING HABITS

A STUDY OF HOW CANADIANS USE THE TELEVISION MEDIUM, WHICH CONCENTRATES ON HOW CANADIANS VIEW CANADIAN PROGRAMMING.

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PURPOSE

In a research proposal dated October 2, 1985, the purpose of this project was defined to answer the following question:

"*How many people view various types of TV programs, of both a Canadian and non-Canadian nature, in Canada's provinces, for how long, on which TV systems and what is the potential viewing base for these program types?*"

There are three main parameters examined in this study. They are...1) TV Program Types, with both Canadian and non-Canadian origination, 2) Regionality and 3) TV Systems.

Each of these parameters have an effect on time spent and the number of individuals tuning to the TV medium.

There are three main target definitions examined...1) Women 18+, 2) Men 18+ and 3) 2-17 year olds. The first plus second targets can be joined to form Adults 18+ and all three target definitions can be joined to form an all persons 2+ target break.

The study is also charged with the task of determining three types of tuning behavior. These types are 1) Time Spent or hours of tuning, 2) Reach or the numbers of individuals who tuned to at least some portion of the programming day, and 3) Potential Reach or the ceiling of reach a TV system or Program Type could expect to obtain in an average week.

There is also an element of trending involved in this study. Three survey periods were examined and TV tuning data is trended over the Fall'84, Fall'83 and Fall'82 period. Each survey measures three weeks of TV tuning behavior which are averaged into one week per survey.

In other words this is a tuning study that examines "macro" usage of the TV medium. It is principally designed to provide an empirical base of data to assist the Task Force on Broadcast Policy in the satisfaction of it's mandate. Before the Task Force can produce recommendations it must understand how Canadians currently use the medium with particular orientation on the use of Canadian programming.

THE DATA SOURCE

BBM TV surveys represent the sole source of data in this study. Specifically the Fall "Sweep" TV Surveys from 1984, 1983 and 1982 were examined and analyzed. "Sweep" refers to the major, nationwide studies whereby BBM collects TV tuning information from respondents over three separate weeks in the months of September through November. This forms the basis for one survey. The three weeks of data are averaged into one average week tuning record in this study. Therefore when this study refers to the 1984 results, it is referring to the one week average of the three weeks measured in the Fall "sweep" survey done in 1984.

A consortium made up of the CRTC, Stats Canada and the DOC regularly purchase, from BBM, these Fall "sweep" week data computer tapes. Stats Canada performs a major re-coding job. Each program measured is designated a "Program Type" code and a "Canadian Origination" designation code. There are hundreds of individual program type classifications used to categorize all programs that are carried on all TV stations, US and Canadian, that Canadians can receive.

The programs are also designated one of five possible Canadian Origination designation codes... 0%, 25%, 50%, 75% and 100%, indicating the degree of Canadian origination.

PROGRAM TYPE

The chart on the following page defines the seven (7) Program Type categories used in this study. They are 1) Current Information, 2) Comedy, 3)Entertainment, 4) Documentary, 5)Live Sports, 6) Sentimental Drama and 7) All Other Drama.

PROGRAM TYPE DEFINITIONS

1) CURRENT INFORMATION...includes

News Bulletin (The National)
Sports News (Sportsline)
Public Affairs (5th Estate, Canada AM)
Edititorial Commentaries (Viewpoint)
Coverage Live (Royal Wedding)
Basic Information (Time/Weather)
Community Interest Bulletin
Partisan Politics (Free Time Political)

2) DOCUMENTARY...includes

Nature (TVO's National Geographic)
Arts and Culture (Music of Man)
Science and Tech. (Nature of Things)
Society (10,000 Day War)
Human (Psychic/Physical phenomena)

INQUIRY
same categories as Documentry except the programs in this grouping examine the "why's" as opposed to the "how's".

INSTRUCTION
Basic (Sesame Street)
Recr. and Skill (What's Cooking)
Social (Cope TVO)
Higher Inst. (University of the Air)

RELIGION
Preaching (100 Huntley Street)
Services (Meeting Place CBC)
Arts (Hymn Sing CBC)
Discussion (Man Alive CBC)

MUSIC AND DANCE
Traditional (Light Musicals CBC)
Music and Popular Dance (Hot Pops CBC)

3) LIVE SPORTS...includes

Sports Coverage (Hockey Night in Canada)
Sports Review +Analysis (NFL Wk in Review)
Scripted Sports (Doug Fisher)

4) ENTERTAINMENT

Games (The Price is Right)
Quizzes (Reach for the Top)
Variety/Popular Songs (Muppet Show)
Variety/Talk (The Tonight Show)

5) COMEDY...includes

Comedy (Mary Tyler Moore)
Fantasy Comedy (Bewitched)
Burlesque Comedy (Get Smart)

6) DRAMA, SENTIMENTAL...includes

Any Drama investigating human feelings and emotions. Examples include Dallas, the common "Soaps", Little House on the Prairie, Love Story.

7) OTHER DRAMA...includes

ACTION ADVENTURE
Adventure (Tarzan)
War (Toro!Toro!)
Western (Bonanza)

SCIENCE FICTION
Hard Science Fiction (Star Trek)
Fantasy Realistic (Andromeda Strain)
Fantasy Unrealistic (Bionic Woman)

CRIME/JUSTICE
Legal System (CHIPS)
Spy (The Avengers)
Crime Inquiry/Lawyer (Magnum PI)

DRAMA, OTHER (Continued)

SUSPENSE
Mystery (Psycho)
Horror/Terror (Alien)
Catastrophe (Airport 77)

HISTORY/DRAMA
Documentary (Waterloo)
Biographical (Patton)

HUMAN DRAMA
Psychological (Cool Hand Luke)
Social (Guess Who's Coming to Dinner)

MISCELLANEOUS
Medical (Marcus Welby MD)
Animal (Littlest Hobo)
Musical (Fame)

CANADIAN DESIGNATION

The designation of the Canadian Origination percentage is made by the CRTC, and all programs contained on the three BBM surveys computer tapes carry the designation. The possible designations are made in 25% increments from 0% (non-Canadian) to 100% (totally Canadian).

In this study a program is considered Canadian if it has a 50%+ Canadian Origination designation. There is for the Fall'84 BBM survey, a printout of all program titles and the Canadian Origination designation percentage listed in alphabetic order. Most of the programs have either a 100% or 0% designation.

TV SYSTEMS

There are 14 TV Systems examined in this study. All TV stations that can be viewed by Canadians fall into one of these 14 systems. In this way tuning habits can be examined by "type" of TV station since the individual TV stations in a system tend to contain similar if not identical program schedules. The systems are:

1) CBC O+O...the CBC, English language, owned and operated stations.

2) CBC Affiliates...the privately owned, English language TV stations which carry CBC Network programming.

3) Global...the sum of tuning to the Global program schedule carried on cable and off-air.

4) TVO/Knowledge Network...these two separate TV systems service Ontario and BC respectively and share a common programming style and non-commercial status.

5) Radio Quebec...this is the French language, Quebec equivalent to TVO.

6) English Independents...these are the English language, privately owned TV stations that neither a CBC nor CTV network affiliation.

7) CBC O+O French...the French language, CBC, owned and operated TV stations.

8) CBC French Affiliates...French language, TV stations privately owned, that carried CBC French network programming.

9) TVA...the French language members of the TVA system.

10) CTV Affiliates...privately owned, English language TV stations that are participants in the CTV network.

11) US Commercial...any viewing to US stations that carry commercials, be they US Network Affiliates or US Independents.

12) PBS...are the English language non-commercial Public Broadcasting System affiliates, that spill into Canada off-air or by cable from border US markets.

13) Pay TV...any viewing to any of the US or Canadian Pay TV channels.

There is a fourteenth TV System that was also accessed that is briefly referenced in this study as "House of Commons". The data included for this system includes not only tuning to the House of Commons coverage carried on many cable systems in Canada but also any tuning to specialty cable channels such as the community channels, community bulletin boards, TVFQ in Quebec, the cable channel that carries TV listings; in summary a melting pot of very small cable delivered services that individually contain little in the way of audience levels.

METHOD OF RECEIVING TV SIGNAL

This report does not distinguish between methods of receiving the TV programs viewed by Canadians. An hour of viewing time to a TV System or a TV program could be viewed on cable, off-air, by dish or in the form of VCR playback.

The issue of "simulcast" is taken into account in the time spent and reach data in this report. Simulcasting is a practice followed by cable companies whereby the cable company deletes the US signal on the cable channel and replaces the signal with a Canadian signal (including the Canadian commercials).

Simulcasting is practiced only when the Canadian TV station is broadcasting the same program at the same time as the US station. BBM automatically makes audience adjustments when simulcasting occurs. The audience that reported tuning to the cable channel that was to carry the US station program is shifted to the Canadian TV station that was substituted by the cable company.

In summary, this report reflects the practice of simulcasting and the shifting of audience levels from US to Canadian TV stations when simulcasting occurs.

ÆGIONALITY

TV viewing habits are examined nationally and also by Canadian province. Tuning in the NW Territories/Yukon is not a part of the National tuning levels.

In the case of Quebec, two language distinctions are made...Home Language English and Home Language French in an attempt to differentiate between the two different TV systems operating in this province. The original computer access printouts that formed the data base for this study, obtained TV tuning data for English, French and Other in Quebec. We prorated the Other tuning levels against the English and French tuning groups according to the ratio of tuning between the English and French groups. This was done to force Quebec into only two rather than three language groups.

It should be noted that the provincial designations in this study reflect the viewers province of residence. There is some degree of viewing to a TV station in say Ontario, by say a resident of Quebec. The tuning activity is allocated, in this example, to the province of Quebec.

COMPUTER ACCESS

The data analyzed and presented in this study comes from a series of print outs produced by the DOC. The DOC accessed the re-coded BBM "sweep" data tapes producing a large array of hours tuned and weekly reach data cross-tabulated by region, TV System, Program Type (both Canadian and non-Canadian) and Target Group.

HYP+N massaged the raw data from these printouts and prepared a series of summary data pages which forms the basis for this study report.

The raw printout that was produced by the DOC will be kept on hand at HYP+N in case questions not addressed in this report are forth coming.

REPORT STRUCTURE

REPORT EMPHASIS

Since this report examines the "macro" dynamics of TV viewing in Canada, it is a collection of facts and observations. The reader will wish to draw conclusions and to this end will examine the study with the "Task Force" mandate in mind.

We have attempted to provide a logical flow of TV viewing information to the Task Force, drawing out reasons why Canadians exhibit their current viewing habits. We are hesitant to make recommendations in this study to the Task Force.

We have studied how Canadians currently view TV medium. We have not studied how Canadians should view the TV medium from the Task Force's point of view.

The study does contain a Canadian Programming orientation. Some comment is made in the report concerning the effect that modification of TV Program Type and TV System might have on the quantity of tuning to Canadian Programming.

ORGANIZATION OF RESULTS

The study begins with a brief overview on TV viewing habits...hours tuned and weekly reach...target group population...tuning patterns over the last three years.

The report then shifts into a detailed summary of the findings contained in the DOC computer access of the BBM data tapes in the following way.

* WOMEN 18+ TV HOURS, FALL'84
* WOMEN 18+ TV REACH, FALL'84
* WOMEN 18+ TV HOURS, FALL'82-'84

* MEN 18+ TV HOURS, FALL'84 vs WOMEN 18+
* MEN 18+ TV REACH, FALL'84 vs WOMEN 18+

* 2-17 YEAR OLDS TV HOURS, FALL'84 vs WOMEN 18+
* 2-17 YEAR OLDS TV REACH, FALL'84 vs WOMEN 18+

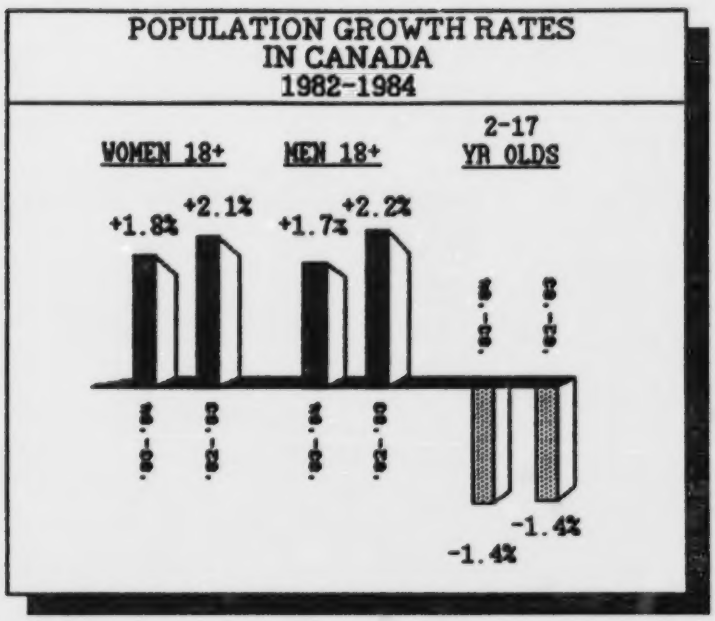
GENERAL TV VIEWING HABITS

POPULATION DATA

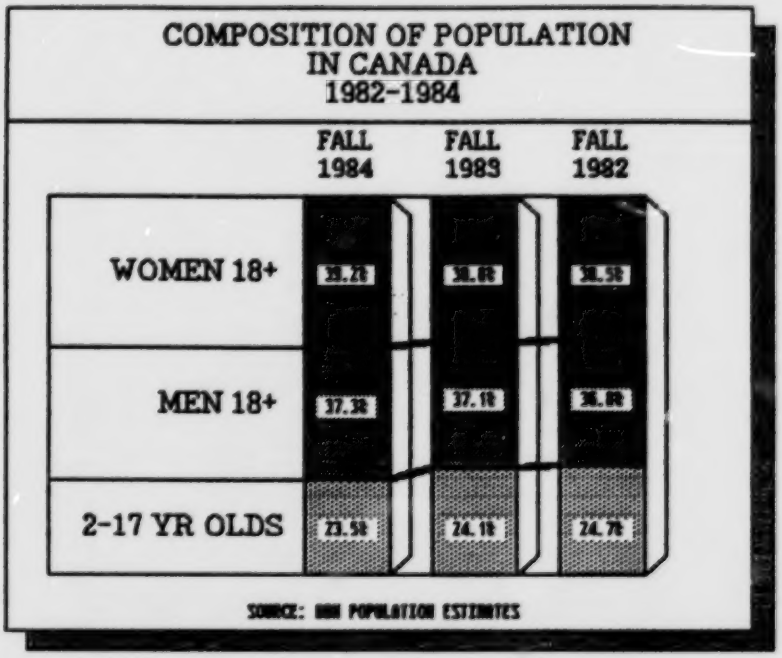
This TV viewing study concentrates on three different target groups...Women 18+, Men 18+ and those aged 2-17 years. The populations of these three groups in total Canada appear below.

	POPULATION NUMBERS		
	WOMEN 18+ (000)	MEN 18+ (000)	2-17 YR OLDS (000)
1984	9,604.0	9,160.2	5,514.9
1983	9,434.0	9,010.0	5,848.8
1982	9,236.7	8,814.1	5,932.2

The 18+ target group has grow in size each year since 1982 while the 2-17 year old group is actually shrinking in absolute size as well as its proportion of all persons 2+ as the two charts on the following page demonstrate.



The 2-17 year old age segment has become smaller at the rate of 1.4% annually between 1982 and 1984.



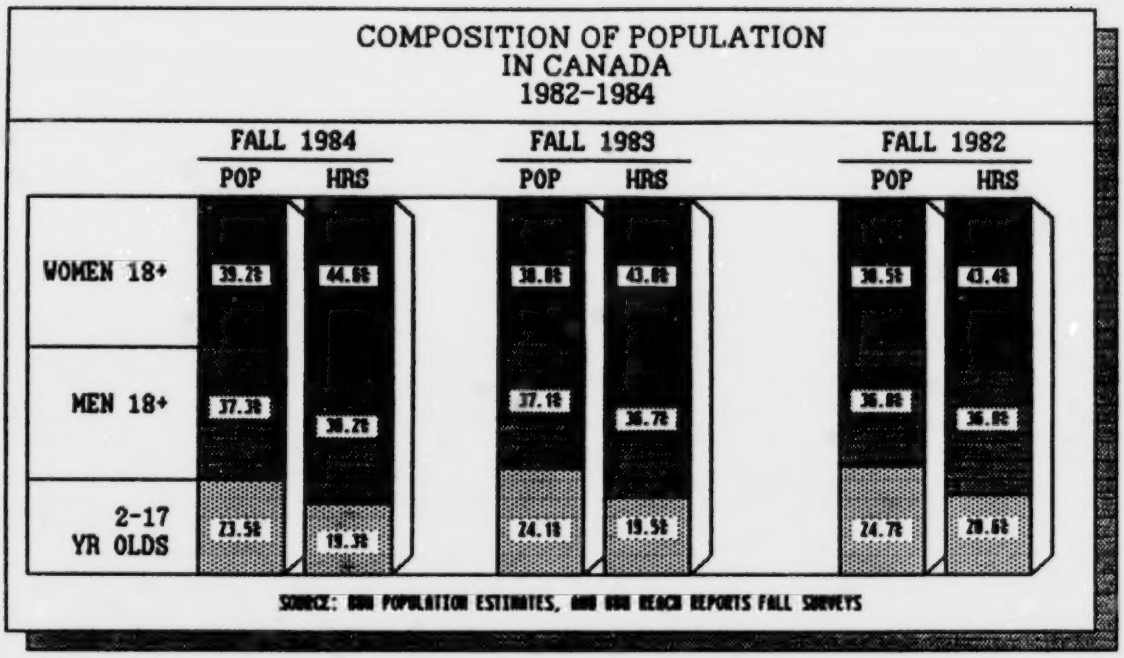
Adults 18+ now represent greater share of the 2+ population than was the case in 1982.There has been little change in shares of population between Women and Men 18+.

TV WEEKLY HOURS DATA

The shifts in population proportions in Canada between 1982 and 1984 has affected the absolute hours of TV viewing.

WEEKLY HOURS OF TUNING NUMBERS			
	WOMEN 18+ (000)	MEN 18+ (000)	2-17 YR OLDS (000)
1984	258,094.6	209,481.2	111,624.4
1983	253,263.9	212,142.7	112,951.1
1982	246,701.6	204,495.2	117,390.0

Just as the 2-17 year old population has declined, so has the hours of tuning and shares of TV viewing as demonstrated below.



In the Fall'84 BBM TV survey Women 18+ were seen to represent 39% of the population yet they accounted for 45% of the TV hours of tuning. Women 18+ are the heaviest TV viewers of the three target groups examined in this report.

PER CAPITA WEEKLY HOURS

Another way to examine time spent with the TV medium by these two target groups is to examine TV hours on a per capita basis.

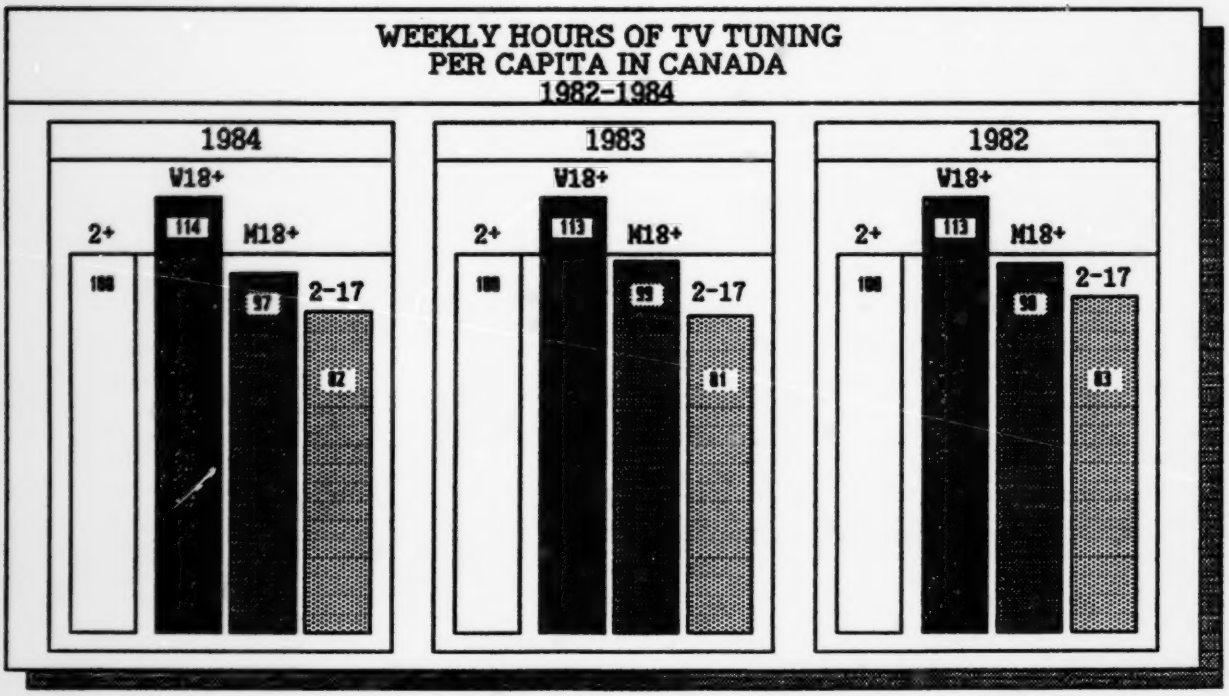
WEEKLY HOURS OF TUNING PER CAPITA				
	WOMEN 18+	MEN 18+	2-17 YR OLDS	2+
1984	26.9	22.9	19.4	23.6
1983	26.8	23.5	19.3	23.8
1982	26.7	23.2	19.8	23.7

Per capita weekly hours spent with TV has not changes between 1982 and 1984, so the shifts in share of TV hours by the three target groups is do to population profile changes, not changes in the groups degree of TV usage.

The chart on the following page provides a graphic depiction of the differences in per capita time spent with TV exhibited by the three targets. The chart provides weekly TV hours per capita indexed against all persons 2+ years of age (100).

Women view the TV medium 14% longer per capita than the total 2+ population base. Men 18+ spend 2% less time per capita... and 2-17 years olds are the lightest of the three targets, spending 18% less time per capita than the 2+ population as a whole.

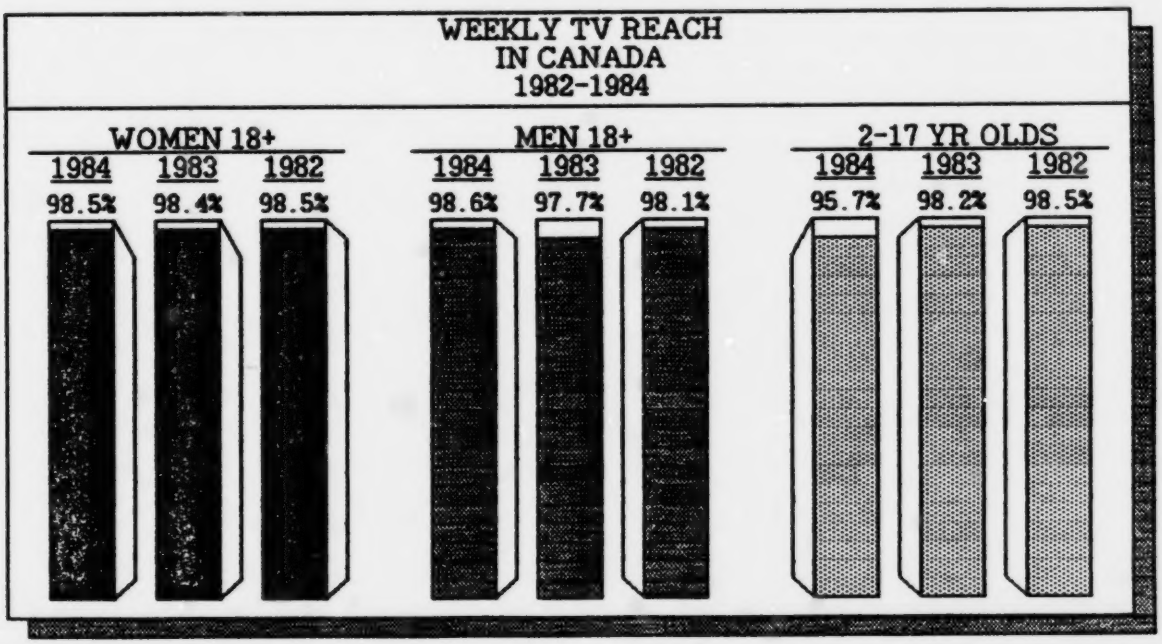
These per capita indices have remained stable over the last three year period.



TV WEEKLY REACH

While time spent with the TV medium varies significantly between Women, Men and 2-17 year olds, the TV medium is viewed at least once a week by almost all of each of the three demographic groups. Weekly reach levels stand at around the 98% level, and have done so over the last three years.

A noticeable drop in 2-17 year old weekly reach was picked up by BBM between the '82/'83 and '84 Fall surveys. The 2-17 year old group has been reached to a 98% degree in the past but in 1984 produced a 96% weekly reach level.



IN SUMMARY

There are four general TV viewing observations that should be kept in mind when reading this study.

1) The under 18 year old segment of the population is shrinking in size and as a proportion of the total population. This affects tuning trends.

2) Women are the heaviest TV viewers. They spend 14% more time each week watching the TV medium than the 2+ population as a whole.

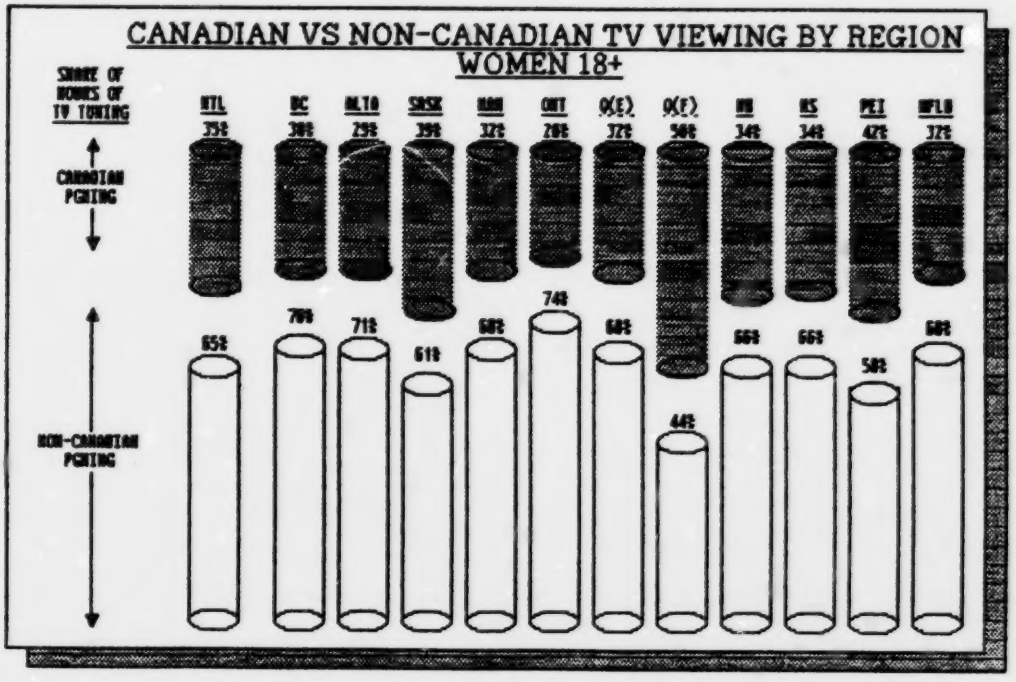
3) The TV medium reaches almost all Canadians each week and with the exception of the 2-17 year old, this reach power has not changed over the last three years.

4) Per capita weekly time spent with the TV medium also has remained stable over the last three years.

WOMEN 18+ TV HOURS, FALL 1984

CANADIAN PROGRAM VIEWING BY REGION

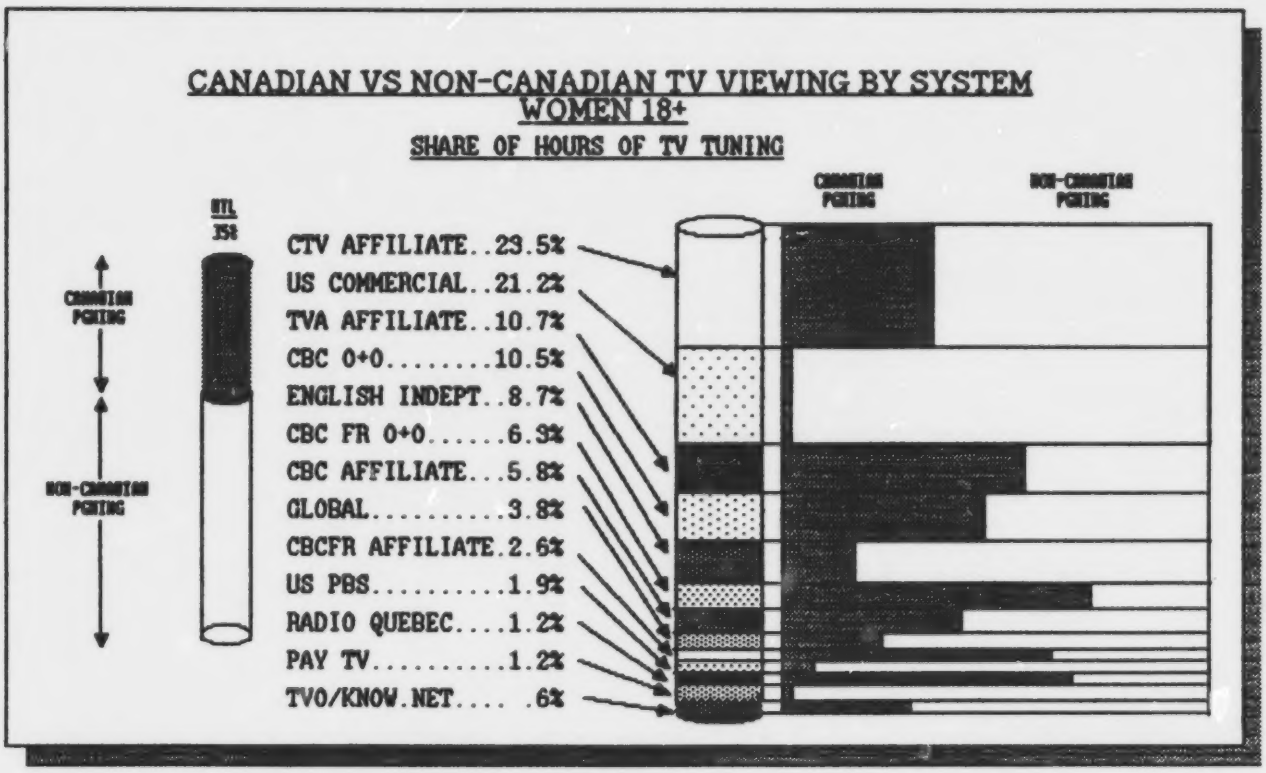
The chart below demonstrates the portion of Women 18+ weekly TV hours that are spent with Canadian programming vs non-Canadian programming (see page 6 for definition) nationally and in each of Canada's provinces and in Quebec English/French.



Nationally, Women 18+ spend 35% of their weekly TV viewing time with Canadian programming. This ranges from a high of 56% amongst those in French Quebec to a low of 26% for Ontario Women 18+.

SHARES OF NATIONAL VIEWING BY TV SYSTEM

The thirteen TV Systems in Canada and their shares of Women 18+ TV viewing are demonstrated below.



A graphic depiction of each systems' Canadian vs non-Canadian tuning profile is also exhibited above.

CTV, US Commercial and CBC O+O together capture over 55% of the time Women in Canada spend with TV. The French language CBC O+O, CBC Affiliates and TVA control French tuning and demonstrate very pronounced CDN program tuning profiles.

VIEWING TO CANADIAN PROGRAMS BY SYSTEM

The chart below ranks TV Systems from the most to least pronounced CDN program viewing profiles.

SYSTEM TV VIEWING SHARES
RANKED BY CDN VS NON-CDN
WOMEN 18+

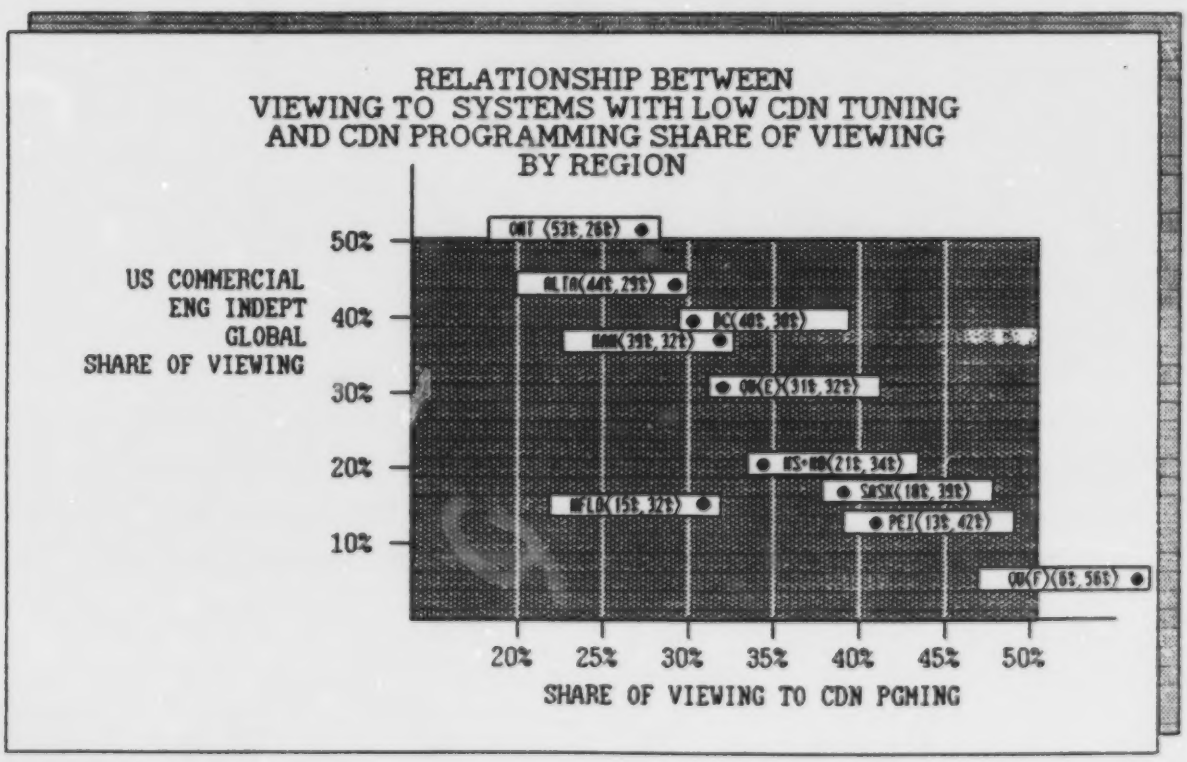
SYSTEM	CDN PGMING	NON-CDN PGMING
CBC FR O+O	77%	23%
RADIO QUEBEC	72%	28%
CBC FR AFFILIATE	64%	36%
CBC ENG O+O	63%	37%
TVA AFFILIATE	53%	47%
CBC AFFILIATE	45%	55%
CTV AFFILIATE	36%	64%
TVO/KNOW.NET.	35%	65%
GLOBAL.	30%	70%
ENG INDEPT.	23%	77%
US PBS	5%	95%
US COMMERCIAL	4%	96%
PAY TV	1%	99%

Three French language systems produce the largest degrees of tuning to Canadian programming... CBC O+O (77% of the hours tuned to the system are to CDN programming), 72% for Radio Quebec and 64% for CBC French Affiliates. TVA has an above average degree of CDN program tuning relative to the 35% national ratio, but falls below the CBC English O+O system which stands at 63%.

There are three commercial TV English language systems that capture significant shares of National TV tuning and have relatively low degrees of tuning to Canadian programming... US Commercial (obviously), English Independents and Global. Two of these systems are Canadian based yet have tuning proportions to their Canadian programming which is <u>less than half of the CBC O+O profile</u>.

The US Commercial TV systems generate 4% of their tuning to Canadian programming... a proportion some may find high. A quick scan of the Fall'84 BBM TV Reports (US Tuning Report) confirms some program titles were produced in Canada. The "Racoon" animation specials, some religious programming, "20 Minute Workout" and a Wilderness Series makes up the 4% tuning proportion.

The chart below demonstrates what happens to a region's propensity to tune into Canadian programming relative to these three systems' share of a regions' hours.



If these three systems (US Commercial, English Independents and Global) have large shares of tuning in a region, that region will devote less time tuning into Canadian programming. If the three systems have little impact in a region, the region will spend more time to Canadian programming.

Paradoxically, the regions that receive these three systems, like Ontario also receive the CBC O+O/Affiliates and therefore have the greatest amount of Canadian programming to choose from; yet Ontario Women 18+ devote the least amount of time to Canadian programming of all the provinces.

We must conclude that as tuning options increase, tuning to Canadian Programming decreases.

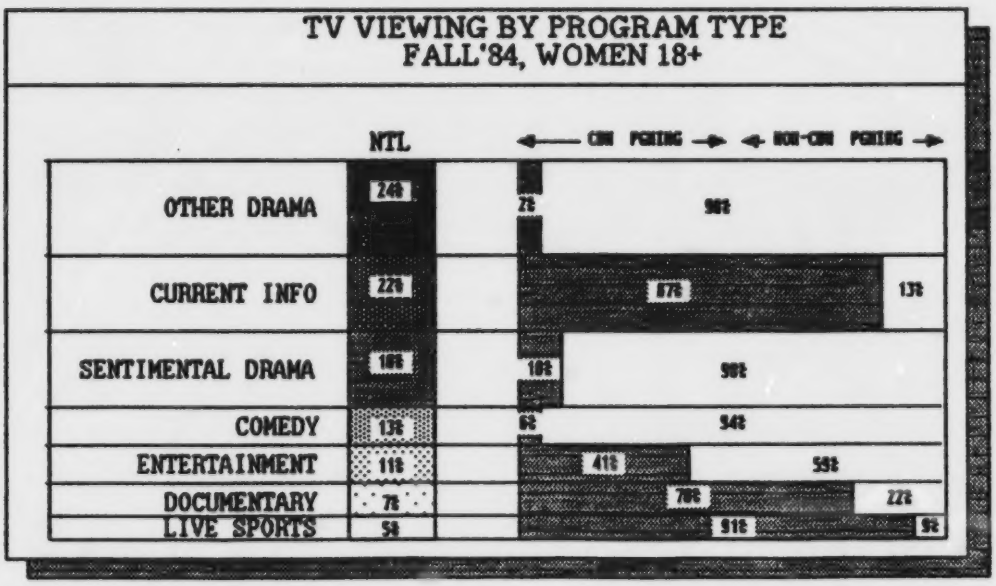
We must also observe that if all provinces received the same degree of tuning options as Ontario, all provinces would parallel Ontario's Canadian programming proportions of total tuning time.

It could also be said that the policy of providing to all of Canada, the same degree of tuning options as is currently available in Ontario, is a policy that will produce results totally contradictory to an attempt to increase tuning to Canadian programming.

One province does not fit neatly onto the curve described in the grid on the page 25...Newfoundland. CTV has a large share of NFLD TV tuning and the network delays a large block of its' Canadian Current Information programming like the National News and W-5 by 1 1/2 hours from Ontario time. People in NFLD see the National News at 12:30 am rather than 11:00 pm. NFLDers are sleeping through large blocks of Canadian programming and this produces the low CDN programming tuning ratio.

CANADIAN PROGRAMMING TUNING BY PROGRAM TYPE

Tuning to the seven program types examined in this study, for Women 18+, Fall'84 BBM, are demonstrated below in two ways. First the share of all national TV tuning captured by the seven program types are shown. The proportion of each program types Canadian vs non-Canadian tuning is also demonstrated.



Other Drama is the program type that captures the largest share of Women 18+ tuning in Canada...24% of all Women 18+ hours of tuning to the TV medium are to Other Drama. All but 2% of the hours of viewing directed to Other Drama, are directed towards non-Canadian programming.

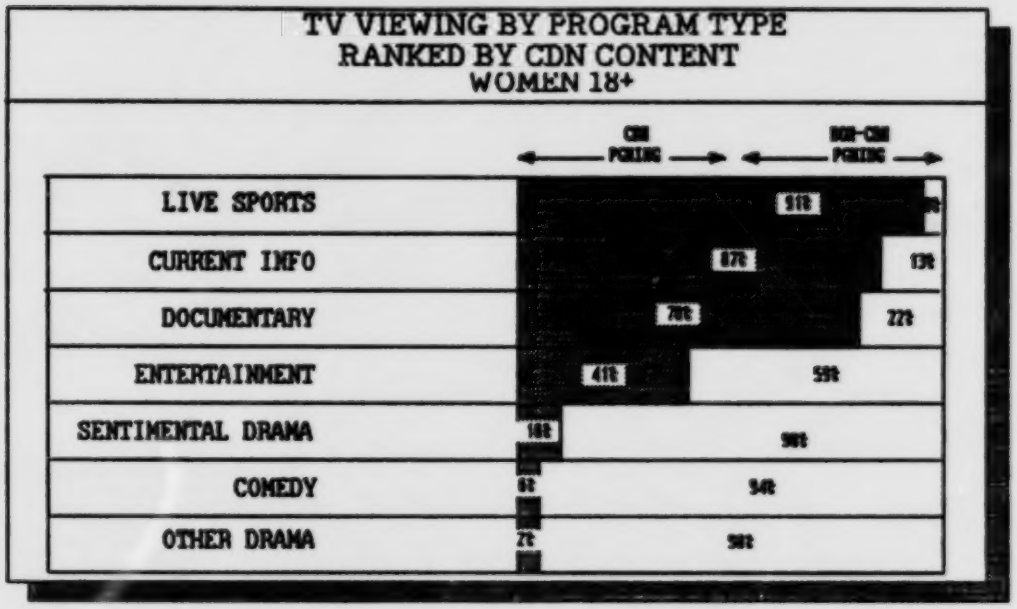
There are two other program types that share this non-Canadian programming skew...Sentimental Drama and Comedy. These three program types account for 55% of all tuning in Canada by Women 18+.

The program types that have a tuning skew towards Canadian programming are Current Information, Documentary and Live Sports. Naturally Live Sports captures a very small share of tuning amongst Women 18+.

There is only one program type that has a relatively even balance of Canadian vs non-Canadian program tuning... Entertainment. This is a program type that includes "Game", "Quiz" and "Variety/Song/Talk" shows. Program production costs are probably lower in this program type hence the ability of Canadian produced programming in this type to capture a reasonably significant degree of tuning.

This leads to the observation that the Entertainment represents the one program type that could develop into a major source of tuning to Canadian programming.

The chart below simply takes the seven program types and ranks them from most to least degree of Women 18+, Fall'84 tuning to Canadian programming.



Current Information programming is the only type with a strong Canadian programming tuning skew which captures a 20%+ share of Women 18+ hours of tuning. This program type includes formal news,sports and weather casts, and live coverage of news worthy events.

PROGRAM TYPE BY TV SYSTEM

Each TV System has, by virtue of it's programming schedule, unique program type tuning profiles. But there are some general similarities in program type profiles between the systems. The chart on the following page provides a graphic depiction of the various systems and how Canadian Women 18+ view the various types of programming on the systems.

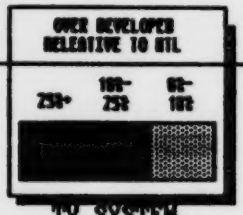
The CBC O+O (English and French), CBC Affiliates (English and French) and Radio Quebec have similarities. These systems have a Current Information, Documentary and Live Sports tuning emphasis relative to the total population's tuning preferences.

TVA has a unique Sentimental Drama and Entertainment tuning skew.

Global and the English Independents share a Sentimental Drama tuning emphasis, reflecting these stations' strong day time program schedules.

The TVO/Knowledge Network system is noted for the high degree of Documentary tuning, while the US Commercial system, PBS, CTV and Pay TV clearly emphasis Other Drama in their tuning profiles.

PROGRAM TYPE PROFILES BY TV SYSTEM WOMEN 18+



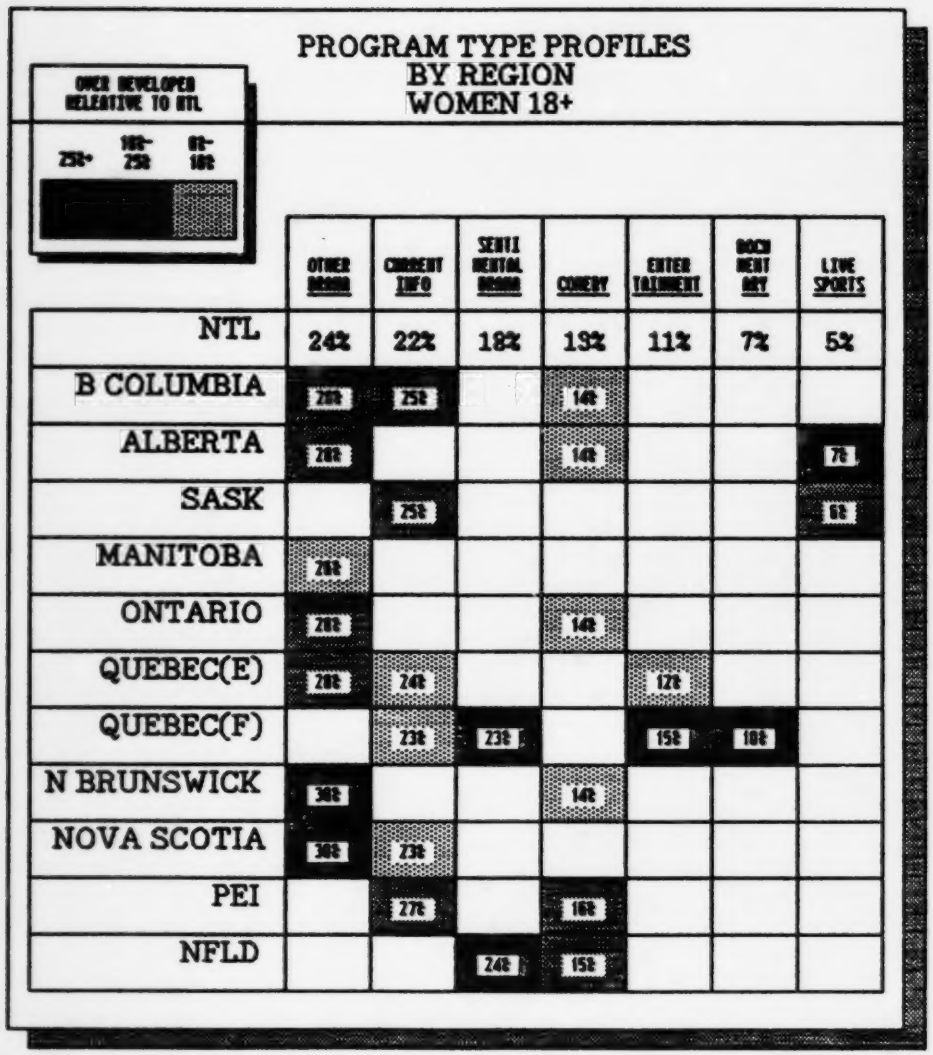
TV SYSTEM MOST TO LEAST CDN	OTHER DRAMA	CURRENT INFO	SEMI MENTAL DRAMA	COMEDY	ENTERTAINMENT	ROCK MUSIC ANY	LIVE SPORTS
NTL	24%	22%	18%	13%	11%	7%	5%
CBC FR O+O		28%	21%		12%	14%	6%
RADIO QU		30%			13%	31%	
CBC FR AFF		23%				13%	
CBC O+O		35%				13%	10%
TVA AFF			27%		14%		
CBC AFF		27%				10%	8%
CTV AFF	33%	25%					
TVO/KN				17%		40%	
GLOBAL		24%	35%		12%		
INDEPT ENG	25%		23%	15%			
US PBS	83%					13%	
US COM	29%			21%	17%		
PAY TV	96%						

PROGRAM TYPE BY REGION

Tuning to Program Types vary dramatically by TV System as demonstrated on the chart on the following page. Differences in tuning patterns to program types by region are not as pronounced. Naturally the greatest difference in provincial tuning by program type occurs in Quebec French...a region that spends far more time with Current Information, Sentimental Drama, Documentary and Entertainment than the country as a whole.

Nova Scotia and New Brunswick demonstrate the next largest degree of tuning variance from the national norm with high shares of tuning against the Other Drama program type.

Also of note is Newfoundland's Sentimental Drama tuning skew and Alberta/Saskatchewan's slight Live Sports orientation.


PROGRAM TYPE PROFILES
BY REGION
WOMEN 18+
OVER DEVELOPED RELATIVE TO NTL
25%+
10%-25%
0%-10%
OTHER
CURRENT INFO
SEMI MENTAL
COMEDY
ENTER TAINMENT
DOCU MENT ARY
LIVE SPORTS
NTL 24% 22% 18% 13% 11% 7% 5%
B COLUMBIA 28% 25% 14%
ALBERTA 28% 14% 7%
SASK 25% 0%
MANITOBA 26%
ONTARIO 28% 14%
QUEBEC(E) 28% 24% 12%
QUEBEC(F) 23% 23% 15% 10%
N BRUNSWICK 30% 14%
NOVA SCOTIA 30% 23%
PEI 27% 16%
NFLD 24% 15%

TUNING BY TV SYSTEM BY REGION

The chart on the following page graphs the shares of tuning that the various systems capture in Canada's provinces.

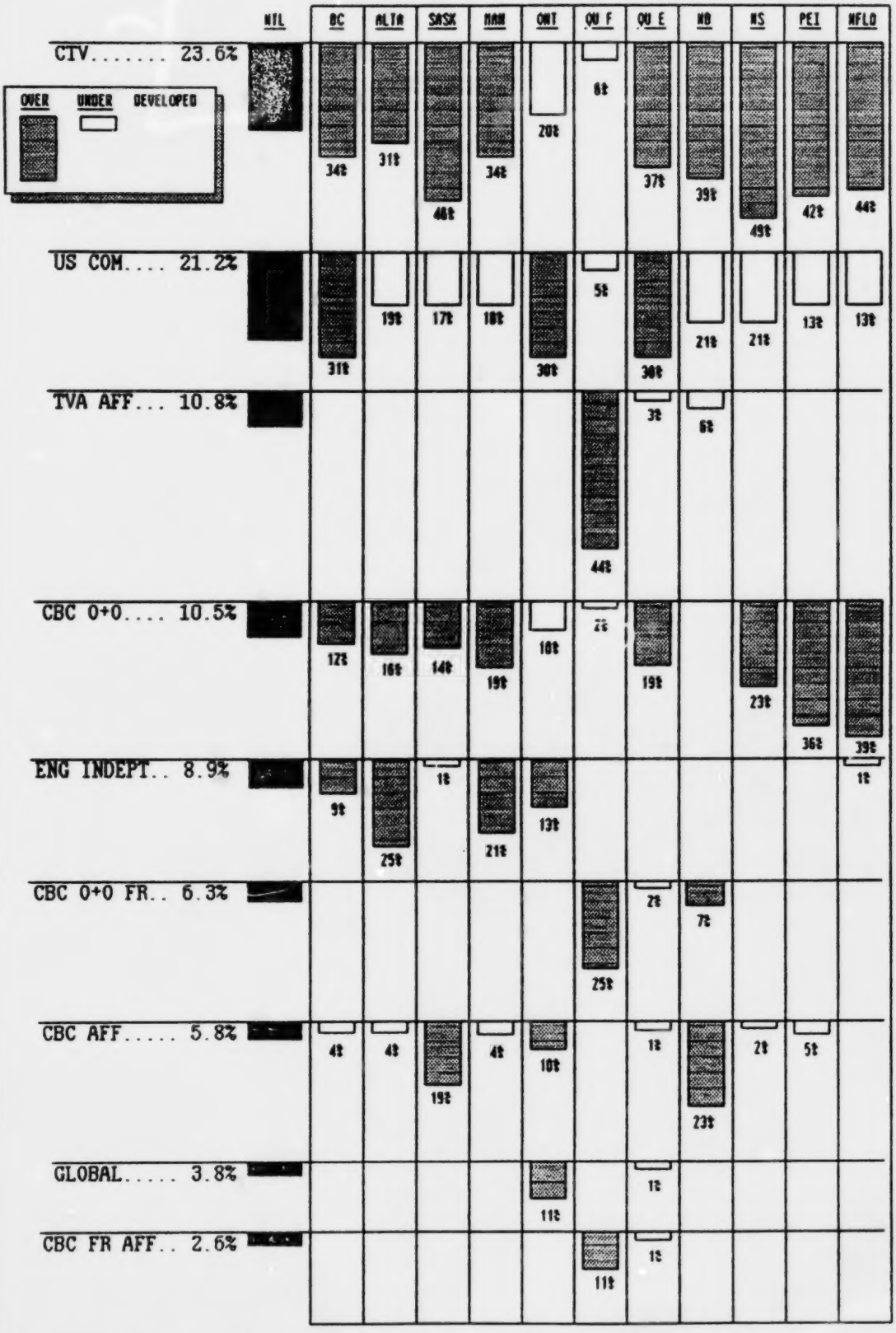
The CTV TV system produces the largest shares of tuning in every province except Ontario and Quebec French. In Ontario the US Commercial system is the largest system and in French Quebec TVA holds the dominent tuning share.

The second largest TV system is either US Commercial or English Independents in the Western provinces, and either CBC O+O or CBC Affiliates in the Atlantic provinces.

CBC French O+O is the second largest system in Quebec French.

This underscores the audience capturing weakness of the CBC O+O and CBC Affiliate TV Systems against Women 18+. In no one province does the CBC play the dominant tuning role. The CBC O+O or CBC Affiliate system has a second rank tuning share in the Atlantic provinces and in Quebec French and a third share rank position in the remaining provinces except Ontario where the rank position stands at number four.

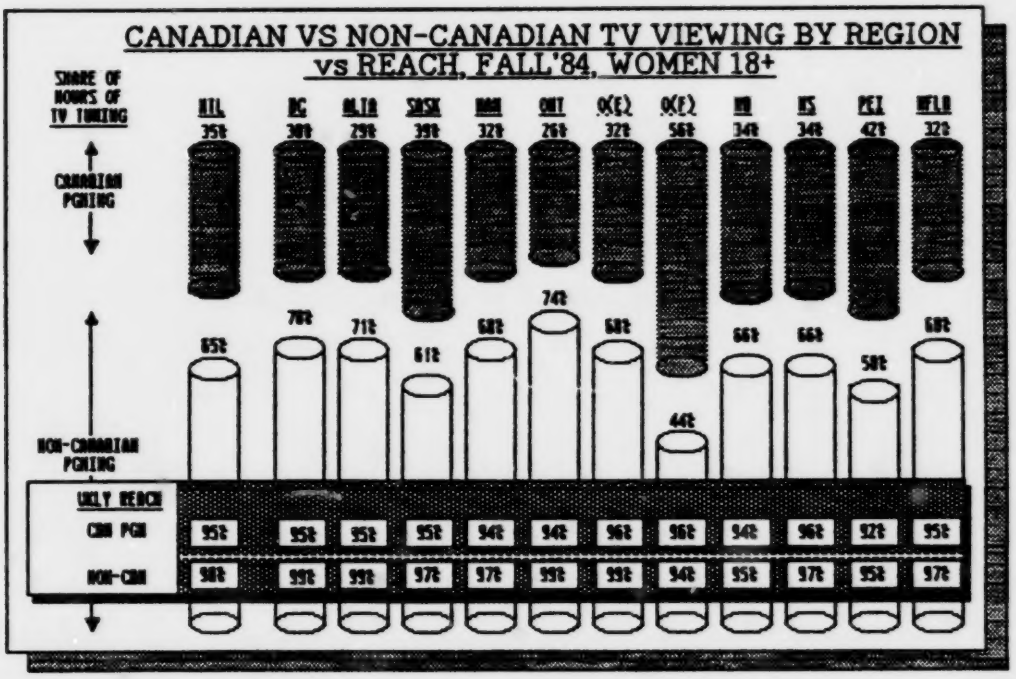
SYSTEM SHARES OF TV TUNING BY REGION
WOMEN 18+



WOMEN 18+ TV REACH, FALL'84

CANADIAN PROGRAM REACH BY REGION

The chart below demonstrates the weekly reach of Women 18+ produced by all Canadian vs non-Canadian programming nationally and each province. The reach data is overlaid upon provincial tuning shares of Canadian programming.



Although Canadian programming captures only 35% of all Women 18+ hours of TV tuning nationally, Canadian programming reaches 95% of all Women 18+. In other words 95% of Women 18+ view at least one 1/4 hour of Canadian programming each week.

The weekly reach levels produced by Canadian programming is slightly lower than the reach level produced against Women 18+ by non-Canadian programming... 98%.

These weekly reach levels for both Canadian and non-Canadian programming do not vary significantly from province to province.

In Quebec French, Canadian programming reaches a slightly larger proportion of Women than non-Canadian programming...the only province where this happens.

In Canada almost every Women 18+ has access to and actually view, some amount of Canadian programming each week. This provides one additional clue in understanding the "macro" viewing dynamic as it relates to Canadian programming. If the share of tuning captured by Canadian programming is particularly low in a province, this factor is <u>not</u> due to the lack of technical coverage. The programming is available.

The ongoing decision by Women 18+ to view or not to view Canadian programming is not a function of Canadian programming availability, it is a function of tuning options. The more TV system options available to Women, the less time Women spend with Canadian programming and this dynamic takes place in the face of the fact that a greater variety of Canadian programs are available to Women with greater TV system viewing options.

TV SYSTEM REACH

This chart provides a comparison, from the Fall'84 BBM survey, of the shares of hours captured by the TV systems and the weekly reach levels of Women 18+ nationally.

NATIONAL SHARE OF TOTAL TV VIEWING
BY TV SYSTEM vs SYSTEM REACH 1984
WOMEN 18+

SYSTEM	SH OF HRS	SYSTEM	WKLY RCH
CTV AFFILIATE	23.5%	CTV AFFILIATE	73%
US COMMERCIAL	21.2%	US COMMERCIAL	62%
TVA AFFILIATE	10.7%	CBC O+O	53%
CBC O+O	10.5%	ENGLISH INDEPT	47%
ENGLISH INDEPT	8.7%	CBC AFFILIATE	29%
CBC FR O+O	6.3%	GLOBAL	23%
CBC AFFILIATE	5.8%	TVA AFFILIATE	21%
GLOBAL	3.8%	US PBS	20%
CBC FR AFFILIATE	2.6%	CBC FR O+O	19%
US PBS	1.9%	RADIO QUEBEC	10%
RADIO QUEBEC	1.2%	CBC FR AFFILIATE	8%
PAY TV	1.2%	TVO/KNOW. NET	8%
TVO/KNOW. NET	.6%	PAY TV	6%

The weekly reach of the TV systems parallels the technical coverage of the TV systems. If one system has a lower reach than another, this is due to a lack of technical coverage.

Several interesting observations can be made when comparing share of hours to weekly reach.

Notice how the French language TV systems drop in reach rank position compared to their shares of hours rank. The systems control large shares of tuning in their home province of Quebec which translate into large national share levels but because the reach is restricted to the province of Quebec only the national weekly reach levels become much diminished.

Another interesting observation can be made relative to CBC's lack of popularity. The English CBC O+O plus CBC Affiliate weekly reach levels can be added to form an 82% weekly reach... the largest technical reach of all TV systems. The CBC O+O plus Affiliate share of hours on the other hand stands only at 16.3%...the third most popular viewing alternative nationally amongst Women 18+. The fact that the most potentially powerful TV system in Canada is the third most viewed system can be related to the large portion of CBC English tuning directed to Canadian programming... a function of the large portion of CBC's program schedule devoted to Canadian shows.

CANADIAN PROGRAMMING REACH BY TV SYSTEM

The chart below compares the TV system total weekly reach levels to the reach produced by Canadian and non-Canadian programming.

NATIONAL TV SYSTEM TOTAL REACH
vs CDN AND NON-CDN REACH, 1984
WOMEN 18+

SYSTEM	TOTAL WKLY RCH	CDN WKLY RCH	NON-CDN WKLY RCH
CTV AFFILIATE	73%	57%	69%
US COMMERCIAL	62%	20%	62%
CBC O+O	53%	45%	45%
ENGLISH INDEPT	47%	24%	36%
CBC AFFILIATE	29%	21%	25%
GLOBAL	23%	14%	22%
TVA AFFILIATE	21%	21%	21%
US PBS	20%	2%	20%
CBC FR O+O	19%	20%	19%
RADIO QUEBEC	10%	10%	5%
CBC FR AFFILIATE	8%	7%	7%
TVO/KNOW. NET	8%	6%	8%
PAY TV	6%	0%	5%

The universal reach of Canadian programming, implied in a total TV viewing context, begins to break down some what when the weekly Women 18+ reach levels produced by Canadian programming by TV system is examined above.

The gap between a TV system's total weekly reach and it's Canadian programming weekly reach provides the realization that there are significant numbers of Women who avoid Canadian programming on any one English language TV system.

On the French language TV systems the total system reach is the same as the Canadian programming reach level, demonstrating that Canadian program avoidance is non existent in Quebec French.

Two English language TV systems show surprising results in terms of Canadian programming reach ceilings.

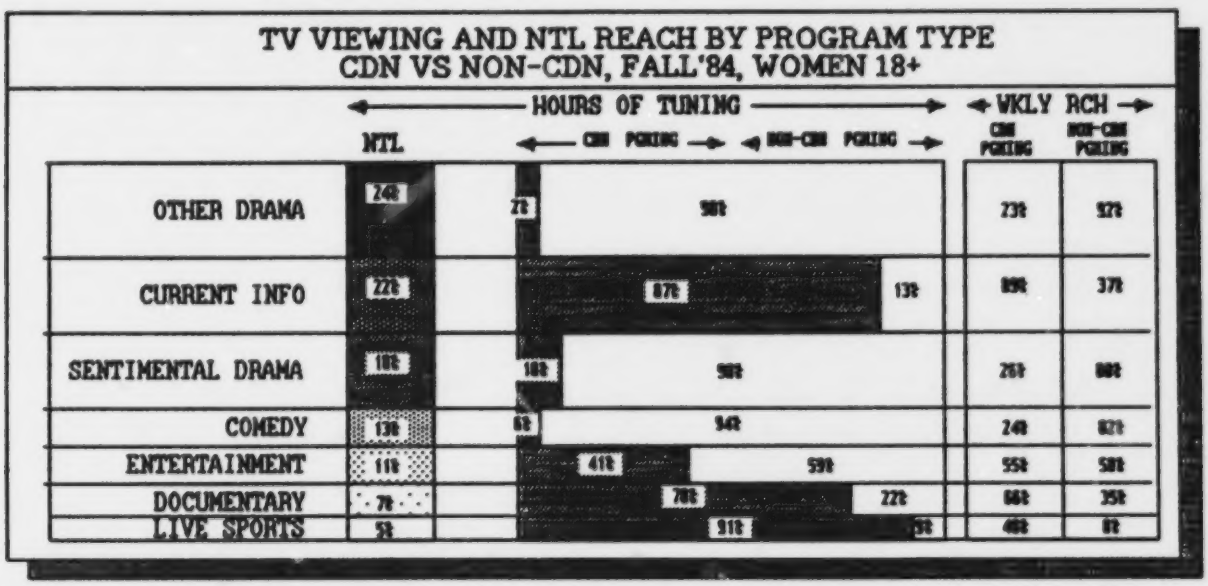
TVO/Knowledge Network has a higher reach ceiling for Canadian programming than one would expect given the Canadian vs non-Canadian share of tuning hours on this system. This suggests that a TVO/Knowledge Network viewer is more likely to sample what little Canadian programming exists on the system(s).

This dynamic suggests that an increase in the amount of Canadian programming, compatible with the TVO/Knowledge Network programming philosophy, would produce increases in hours of tuning to Canadian programming rather than avoidance of this type of programming.

CBC Affiliates show quite the opposite dynamic. The Canadian programming reach ceiling is lower than expected given the fact that 45% of all tuning on this system is to Canadian programming. This suggests that relatively fewer CBC Affiliate viewers are prepared to view Canadian programming but those who do, spend relatively large portions of their TV time with this programming.

REACH OF PROGRAM TYPES

This chart superimposes Women 18+, Fall'84 weekly reach levels achieved by Program Types onto the shares of all tuning captured by these program types.



Other Drama accounts for 24% of all Women 18+ TV tuning in Canada. The reach level produced in Canada by Canadian Other Drama is 23%...for the non-Canadian portion of Other Drama the reach level is 92%. It is surprising that such a small portion of Other Drama tuning captured by Canadian programs, could generate such a large reach level. This is not unique to Other Drama. The other program types which show low Canadian program tuning such as Sentimental Drama and Comedy also have relatively large penetration of Women 18+.

This again suggests that the low degree of Women 18+ tuning to Canadian programming can not be blamed upon lack of technical coverage.

Also of interest in the chart on the previous page, is the large degree of reach obtained by each of the program types. Documentary for example which only captures 7% of all tuning in Canada by Women 18+, has a Canadian program reach of 66% and a non-Canadian program reach of 35%. Together the Canadian plus non-Canadian reach of Documentary is in excess of 75%. If we assume that only 7% of TV schedules in Canada are made up of Documentary program types, the 75% reach level seems remarkably high.

What other media vehicle in Canada could claim a 75% coverage but only a 7% share of tuning?

We are once again reminded that target groups view programming not TV stations. The Women viewer selects TV shows, unaware, on the whole, of what TV station is being viewed. This dynamic, unique to the TV medium, allows this unbalanced between share of hours and reach to exist. Women 18+ will sample most of the program types on TV at least once over the course of a week, but dedicate their hours of tuning on the basis of program popularity, degree of tuning options and quantity of programming available to view.

In technical TV viewing terms, Canadian programs currently reach large portions of Canadians in the Other Drama segment (23%), in the Sentimental Drama segment (26%), in the Comedy segment (24%) and in the Entertainment segment (55%) even though each of these program types have very low degrees of Canadian program tuning.

Reach of Canadian Drama programming can be made to increase by increasing the quantity of such programming on the air waves, and/or by reducing viewing options. This option reduction approach and the effect on reach is clearly seen when reach of Canadian program type is examined by region.

REACH OF PROGRAM TYPE BY REGION

The chart on the following page plots, for Canadian programming only, reach levels against Women 18+, Fall'84, by province. As we move east, Canadian Other Drama programming produces larger and larger reach levels. This is because tuning options are lower in the eastern provinces than in Ontario/West. Saskatchewan is an exception. Viewing options (soon to change) in Saskatchewan are lower than in neighbouring Alberta and Manitoba. Even though the existing Canadian Drama programming will remain in Saskatchewan when third service is introduced, and even though the third service will introduce some degree of new Canadian Drama programming, the reach levels produced by Canadian Drama programming will decline.

CANADIAN PROGRAM TYPE REACH BY REGION, FALL'84 WOMEN 18+

REACH GREATER THAN NATIONAL

	OTHER DRAMA	CURRENT INFO	SEMI MENTAL DRAMA	COMEDY	ENTER TAINMENT	ROCK MUSIC ART	LIVE SPORTS
NTL	23%	89%	26%	24%	55%	66%	40%
B COLUMBIA	14%	89%	8%	18%	38%	61%	39%
ALBERTA	19%	87%	9%	17%	58%	62%	43%
SASK	26%	92%	13%	22%	59%	68%	44%
MANITOBA	18%	90%	11%	15%	47%	69%	43%
ONTARIO	15%	87%	9%	18%	48%	57%	35%
QUEBEC(E)	24%	91%	13%	16%	47%	62%	37%
QUEBEC(F)	38%	91%	74%	68%	78%	81%	46%
N BRUNSWICK	27%	87%	25%	29%	56%	68%	37%
NOVA SCOTIA	34%	92%	28%	23%	64%	73%	37%
PEI	46%	90%	29%	29%	59%	77%	48%
NFLD	44%	90%	23%	28%	77%	76%	36%

The reverse pattern can be seen of the chart following where the reach levels produced in the provinces are examined for the non-Canadian portion of the various program types. Non-Canadian program reach is higher Ontario/West.

NON-CANADIAN PROGRAM TYPE REACH BY REGION, FALL'84 WOMEN 18+

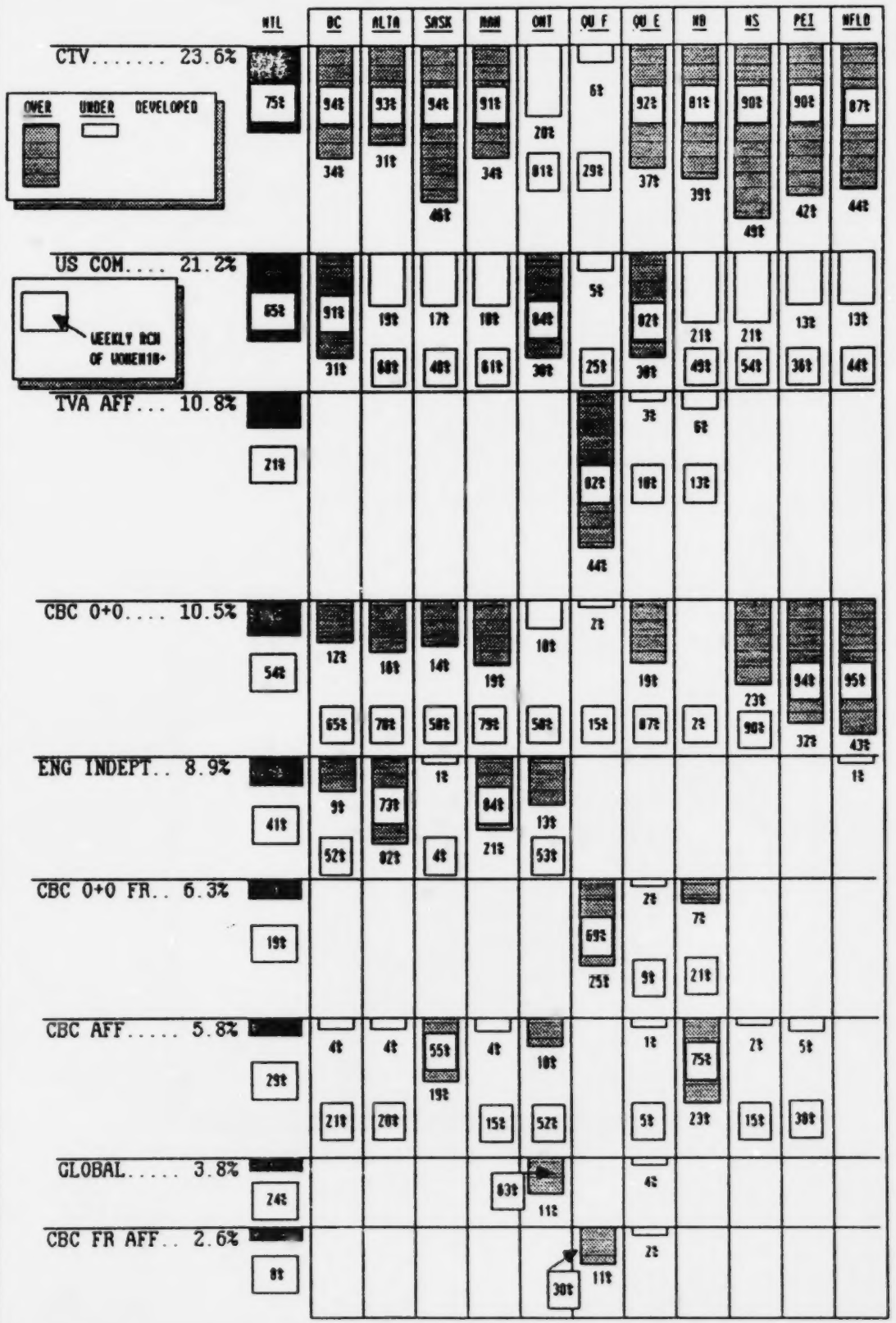
■ REACH GREATER THAN NATIONAL

	OTHER DRAMA	CURRENT INFO	SEMI MENTAL DRAMA	COMEDY	ENTER TAINMENT	ROCK MENT ARY	LIVE SPORTS
NTL	92%	37%	80%	82%	58%	35%	8%
B COLUMBIA	95%	61%	77%	87%	68%	42%	9%
ALBERTA	96%	44%	79%	90%	65%	32%	10%
SASK	93%	26%	80%	89%	57%	30%	8%
MANITOBA	92%	29%	82%	88%	68%	45%	8%
ONTARIO	94%	50%	80%	87%	70%	35%	12%
QUEBEC(E)	96%	43%	80%	85%	70%	29%	10%
QUEBEC(F)	87%	8%	80%	65%	34%	30%	7%
N BRUNSWICK	91%	23%	76%	87%	44%	33%	8%
NOVA SCOTIA	92%	31%	79%	89%	41%	33%	7%
PEI	80%	31%	77%	86%	26%	26%	4%
NFLD	91%	25%	87%	92%	65%	41%	5%

TV SYSTEM REACH BY REGION

The chart which follows provides a useful summary of TV system reach by region superimposed upon the share of Women 18+ hours of tuning devoted to each system by region.

SYSTEM SHARES OF TV TUNING BY REGION WITH WOMEN 18+ WEEKLY REACH, FALL'84



WOMEN 18+ TV HOURS, 1982–'84

CANADIAN PROGRAM VIEWING BY REGION '82–'84

The chart below takes the proportions of national and provincial hours of tuning by Women 18+ to Canadian programming for 1984 and compares these levels to the levels of tuning captured by Canadian programming in previous years. The obvious question here is whether there is a trend being exhibited in Canada towards more or less tuning to Canadian programming. The answer is... little change.

PORTION OF TV VIEWING TO CDN PROGRAMMING
BY REGION, 1982-1984
WOMEN 18+

REGION	1984	1983	1982
NATIONAL	35%	34%	34%
BC	30%	32%	28%
ALTA	29%	27%	28%
SASK	39%	35%	35%
MAN	32%	28%	28%
ONT	26%	24%	25%
QU(E)	32%	26%	27%
QU(F)	56%	57%	56%
NB	34%	30%	29%
NS	34%	31%	31%
PEI	42%	33%	35%
NFLD	32%	28%	33%

There is some indication that a trend towards growth in viewing to Canadian programming is occurring in the three Atlantic provinces and in Saskatchewan due primarily to growth in the CTV's viewing proportions to Canadian programs.

The proportion of viewing to programs of Canadian origin in Quebec French is quite constant.

Newfoundland is the only province that has demonstrated a degree of decline in the share of hours captured by Canadian programming.

VIEWING TO CANADIAN PROGRAMMING BY SYSTEM '82-'84

The driving force behind changes in regional propensity to view Canadian vs non-Canadian programming is the viewing patterns exhibited on the various TV systems in Canada. The chart on the following page provides a 1982 to 1984 comparison of these levels by system for Women 18+ nationally.

PORTION OF TV VIEWING TO CDN PROGRAMMING 1982-1984, WOMEN 18+

SYSTEM	1984	1983	1982
CBC FR O+O	77%	73%	67%
RADIO QUEBEC	72%	71%	81%
CBC FR AFFILIATE	64%	62%	56%
CBC ENG O+O	63%	59%	62%
TVA AFFILIATE	53%	65%	63%
CBC AFFILIATE	45%	43%	43%
CTV AFFILIATE	36%	33%	34%
TVO/KNOW.NET.	35%	36%	36%
GLOBAL	30%	31%	30%
ENG INDEPT.	23%	22%	22%
US PBS	5%	3%	0%
US COMMERCIAL	4%	2%	0%
PAY TV	1%	0%	0%

Systems affecting Quebec French show different trends. The French language CBC O+O and Affiliates systems have increased the proportions of total viewing directed towards Canadian programming substantially over the last three years. Radio Quebec and TVA on the other hand have lower Canadian program tuning ratios now than in 1982.

In English Canada there is slight growth in Canadian program tuning levels demonstrated by CBC O+O and Affiliates and the CTV systems. The TVO/Knowledge Network has a slightly lower Canadian tuning ratio now and little change is observed amongst the Global and English Independents.

NATIONAL SHARE OF TUNING BY SYSTEM '82-'84

The chart below compares the 1984 TV system shares of national Women 18+ tuning for 1984 to previous years.

NATIONAL SHARE OF TOTAL TV VIEWING
BY TV SYSTEM, 1982-1984
WOMEN 18+

SYSTEM	1984	1983	1982
CTV AFFILIATE	23.5%	27.2%	26.7%
US COMMERCIAL	21.2%	21.7%	22.5%
TVA AFFILIATE	10.7%	8.9%	11.5%
CBC O+O	10.5%	10.6%	10.6%
ENGLISH INDEPT	8.7%	8.0%	8.1%
CBC FR O+O	6.3%	5.7%	5.3%
CBC AFFILIATE	5.8%	5.8%	5.9%
GLOBAL	3.8%	3.6%	3.1%
CBC FR AFFILIATE	2.6%	3.0%	3.0%
US PBS	1.9%	1.6%	1.6%
RADIO QUEBEC	1.2%	1.1%	.6%
PAY TV	1.2%	.9%	-%
TVO/KNOW. NET	.6%	.7%	.6%

What effect has changes in Canadian program viewing levels had on a system's share of tuning? The answers vary between English and French Canada.

In French Canada, where French CBC O+O produced growth in Canadian programming tuning levels, the share for the system grew. French CBC Affiliate system's share remains stable but TVA which produced a decline in viewing proportions to Canadian programs experienced a decline in tuning share since '82.

In French Quebec it is possible, in fact advisable, to obtain system tuning growth via growth in Canadian programming.

This rule of thumb does not apply to English Canada. The CTV system obtained some measure of growth in the proportion of total tuning directed towards Canadian programming and the system lost tuning share, possibly as a result. CBC O+O and Affiliates have slightly larger proportions of tuning to Canadian programs and they also lost share of total tuning.

The only English language TV systems that experienced share gain since '82 have been Global and the English Independents and both of these TV systems registered little change in the proportions of total tuning to Canadian programming.

This highlights the major disincentive of Canadian programming for English TV systems. Their operating premise, on the basis of these results, must be to limit the proportion of the TV schedule devoted to Canadian programming, because increases in this programming type will produce loss of tuning share and loss in ad revenues.

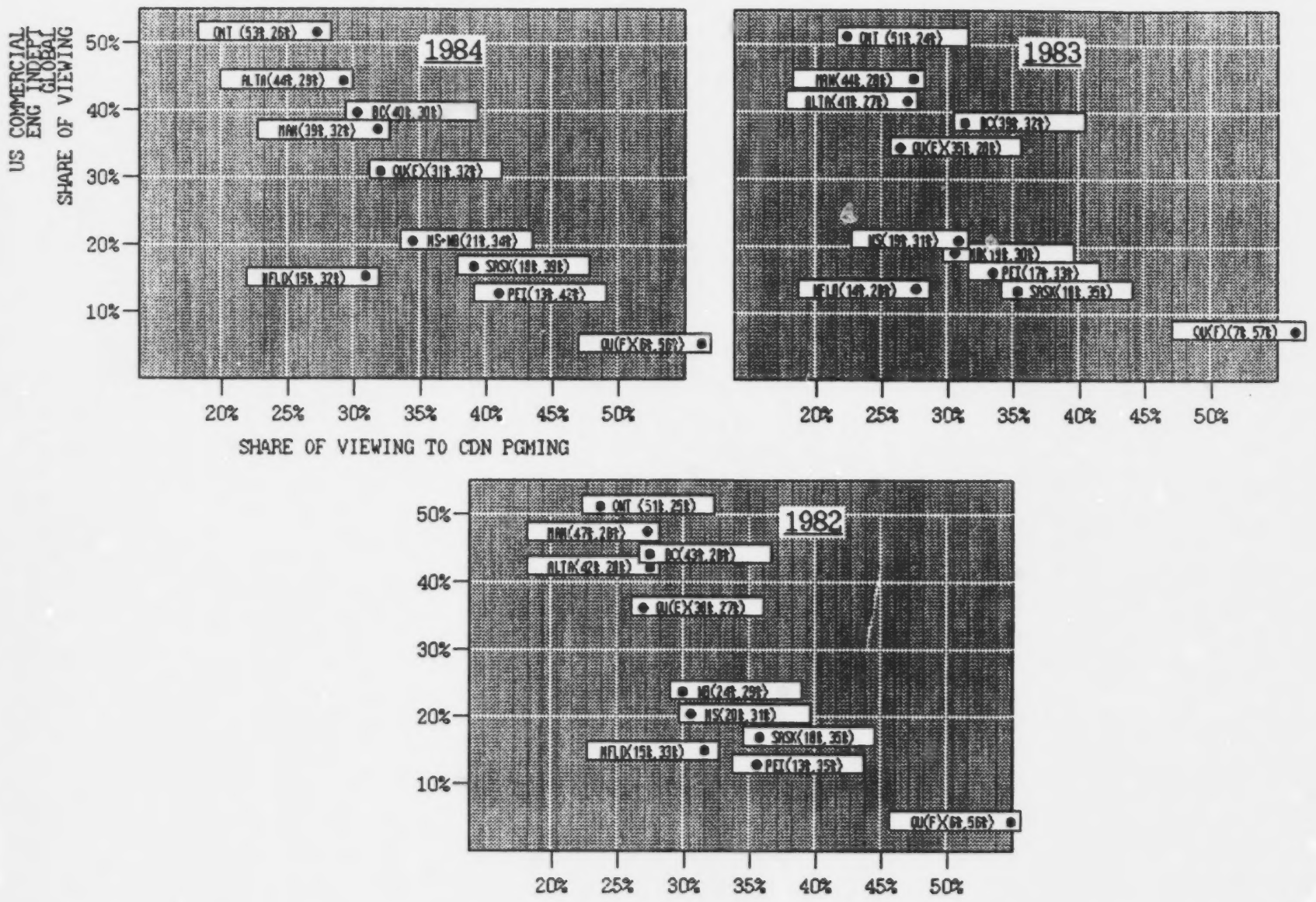
SYSTEM TUNING SHARES BY REGION vs CDN TUNING '82-'84

Earlier in this study regions were plotted on a grid made up of Global + English Independents + US Commercial system shares of a region's TV tuning vs the amount of tuning that region directed towards Canadian programming. We found that when these three systems captured large portions of TV viewing in a region, that region experience low degrees of tuning to Canadian programming. An important conclusion was drawn as a result of this analysis. The existence of viewing options has a negative effect on tuning levels to Canadian programming.

The grid on the following page duplicates the 1984 analysis for 1983 and 1982. The observations made from the 1984 analysis are duplicated when repeated for 1983 and 1982.

Also note that Newfoundland fails to behave like the other regions when plotted against these two references in 1983 and 1982... reinforcing the 1984 observation.

RELATIONSHIP BETWEEN VIEWING TO SYSTEMS WITH LOW CDN CONTENT AND CDN PROGRAMMING SHARE OF VIEWING BY REGION



MEN 18+ TV HOURS, FALL '84 vs WOMEN 18+

The study now turns to a description of Men 18+ usage of the TV medium. So far, in this study, all observations made have been for Women 18+. This section of the report will therefore position Men 18+ data relative to the observations made against the Women 18+ target.

CANADIAN PROGRAM VIEWING BY REGION

PORTION OF TV VIEWING TO CDN PROGRAMMING
BY REGION, 1984
WOMEN 18+ vs MEN 18+

REGION	W18+	M18+	M18+ INDEX TO W18+
NATIONAL	35%	40%	114
BC	30%	38%	127
ALTA	29%	38%	131
SASK	39%	45%	118
MAN	32%	39%	122
ONT	26%	33%	127
QU(E)	32%	37%	116
QU(F)	56%	55%	98
NB	34%	38%	112
NS	34%	41%	121
PEI	42%	44%	105
NFLD	32%	41%	128

Total TV weekly hours of tuning by Men 18+ splits 40% to Canadian programming... 60% to non-Canadian programming.

Relative to Women 18+, Men 18+ have a 14% (see index above) greater propensity to view Canadian produced shows.

This propensity, relative to Women 18+, applies to the Men 18+ English language segment of the population only. Amongst French language Men 18+, 55% of the TV viewing week is dedicated to Canadian programming vs 56% of Women 18+ weekly hours of viewing. Men and Women share a common Canadian TV programming preference in French Quebec.

The Canadian TV programming portion of the English Men 18+ weekly hours of viewing is highest in Saskatchewan, Nova Scotia, PEI and NFLD. The Men 18+ Canadian programming percentages by region are relatively consistent compared to Women.

SHARE OF VIEWING BY SYSTEM

The chart below compares national Men 18+ shares of TV viewing captured by the various TV systems available to Canadians, to system shares of Women 18+ according to the Fall'84 BBM survey.

NATIONAL SHARE OF TOTAL TV VIEWING BY TV SYSTEM, 1984 WOMEN 18+ vs MEN 18+

SYSTEM	W18+	SYSTEM	M18+
CTV AFFILIATE	23.5%	CTV AFFILIATE	23.2%
US COMMERCIAL	21.2%	US COMMERCIAL	19.6%
TVA AFFILIATE	10.7%	CBC O+O	12.0%
CBC O+O	10.5%	TVA AFFILIATE	9.8%
ENGLISH INDEPT	8.7%	ENGLISH INDEPT	9.0%
CBC FR O+O	6.3%	CBC AFFILIATE	6.5%
CBC AFFILIATE	5.8%	CBC FR O+O	5.8%
GLOBAL	3.8%	GLOBAL	3.4%
CBC FR AFFILIATE	2.6%	CBC FR AFFILIATE	2.8%
US PBS	1.9%	US PBS	2.0%
RADIO QUEBEC	1.2%	PAY TV	2.0%
PAY TV	1.2%	RADIO QUEBEC	1.1%
TVO/KNOW. NET	.6%	TVO/KNOW. NET	.7%

Relative to Women 18+, French language TV systems capture lower shares of national Men 18+ TV viewing. French CBC O+O is the exception to this general observation.

In addition Men 18+ shares of TV tuning are higher than the corresponding Women 18+ shares for English CBC O+O and Affiliates, English Independents, US PBS and Pay TV.

TUNING BY SYSTEM BY REGION

The chart on the following page provides TV system shares of tuning by province. If a system's share of a province is greater than the share of Men 18+ TV tuning nationally, the bar is shades indicating over development. A comparable chart exists for Women 18+ on page 36. Take a moment and compare the regional TV tuning patterns between these two charts.

In all regions the Men 18+ system patterns are very similar to the regional tuning patterns for Women 18+. There are differences in the absolute regional shares of tuning between Men and Women but these are in line with the differences in the national tuning share differences.

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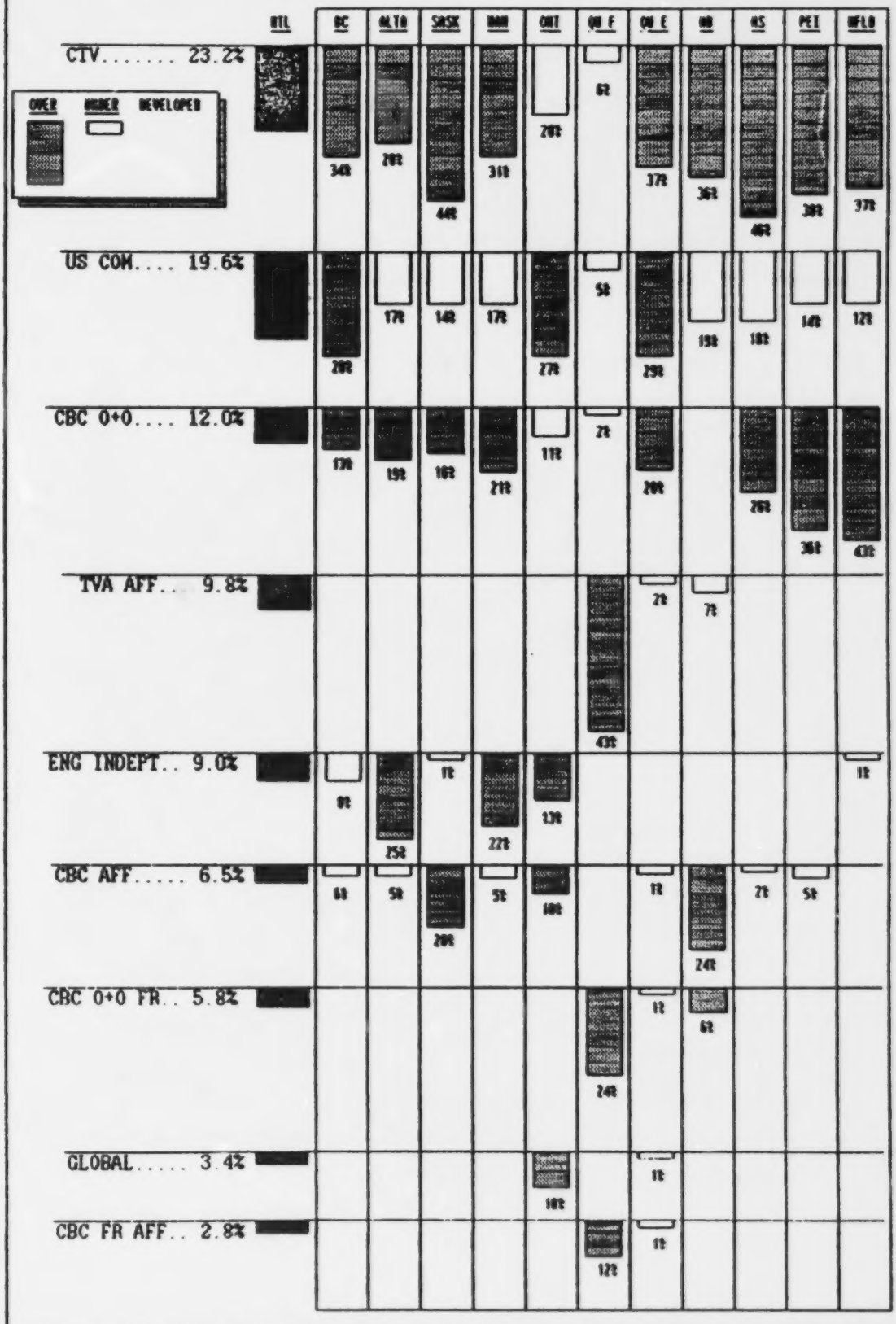
SYSTEM SHARES OF TV TUNING BY REGION...1984
MEN 18+



VIEWING TO CANADIAN PROGRAMMING BY SYSTEM

The chart below ranks TV Systems according to the split in tuning between Canadian and non-Canadian programming. The Men 18+ rank is compared to a Women 18+ rank.

PORTION OF TV VIEWING TO CDN PROGRAMMING
1984
WOMEN 18+ vs MEN 18+

W18+		M18+	
SYSTEM RANKED FROM MOST TO LEAST CDN PGMING		SYSTEM RANKED FROM MOST TO LEAST CDN PGMING	
CBC FR O+O	77%	CBC FR O+O	76%
RADIO QUEBEC	72%	CBC ENG O+O	72%
CBC FR AFFILIATE	64%	RADIO QUEBEC	68%
CBC ENG O+O	63%	CBC FR AFFILIATE	63%
TVA AFFILIATE	53%	TVA AFFILIATE	52%
CBC AFFILIATE	45%	CBC AFFILIATE	51%
CTV AFFILIATE	36%	CTV AFFILIATE	43%
TVO/KNOW.NET.	35%	GLOBAL.	40%
GLOBAL.	30%	TVO/KNOW.NET.	32%
ENG INDEPT.	23%	ENG INDEPT.	32%
US PBS	5%	US COMMERCIAL	8%
US COMMERCIAL	4%	US PBS	5%
PAY TV	1%	PAY TV	2%

Relative to Women, the French language TV systems have lower portions of total Men 18+ TV tuning dedicated to Canadian programming.

With the exception of the TVO/Knowledge Network group, the English language TV systems have larger proportions of Men 18+ tuning to Canadian shows than Women 18+.

The English CBC O+O TV system generates a Canadian programming share of Men 18+ weekly hours which is almost as large as it's French language counterpart. Global, which produces a relatively low portion of Women 18+ "Canadian" tuning relative to CTV, approaches the CTV Canadian programming proportion for Men 18+.

The interesting observation here is that TV system shares of Men 18+ TV hours improve, relative to Women 18+, as the system's proportion of viewing to Canadian programming increases.

This is in stark contrast to the observation made on page 54. Here we determined that over time, an English language TV system's share of Women 18+ weekly hours of TV tuning declined as that system's proportion of tuning to Canadian programming grew. In the case of Men 18+ tuning to a system tends to grow when the proportion of a system's total tuning moves towards CDN programming.

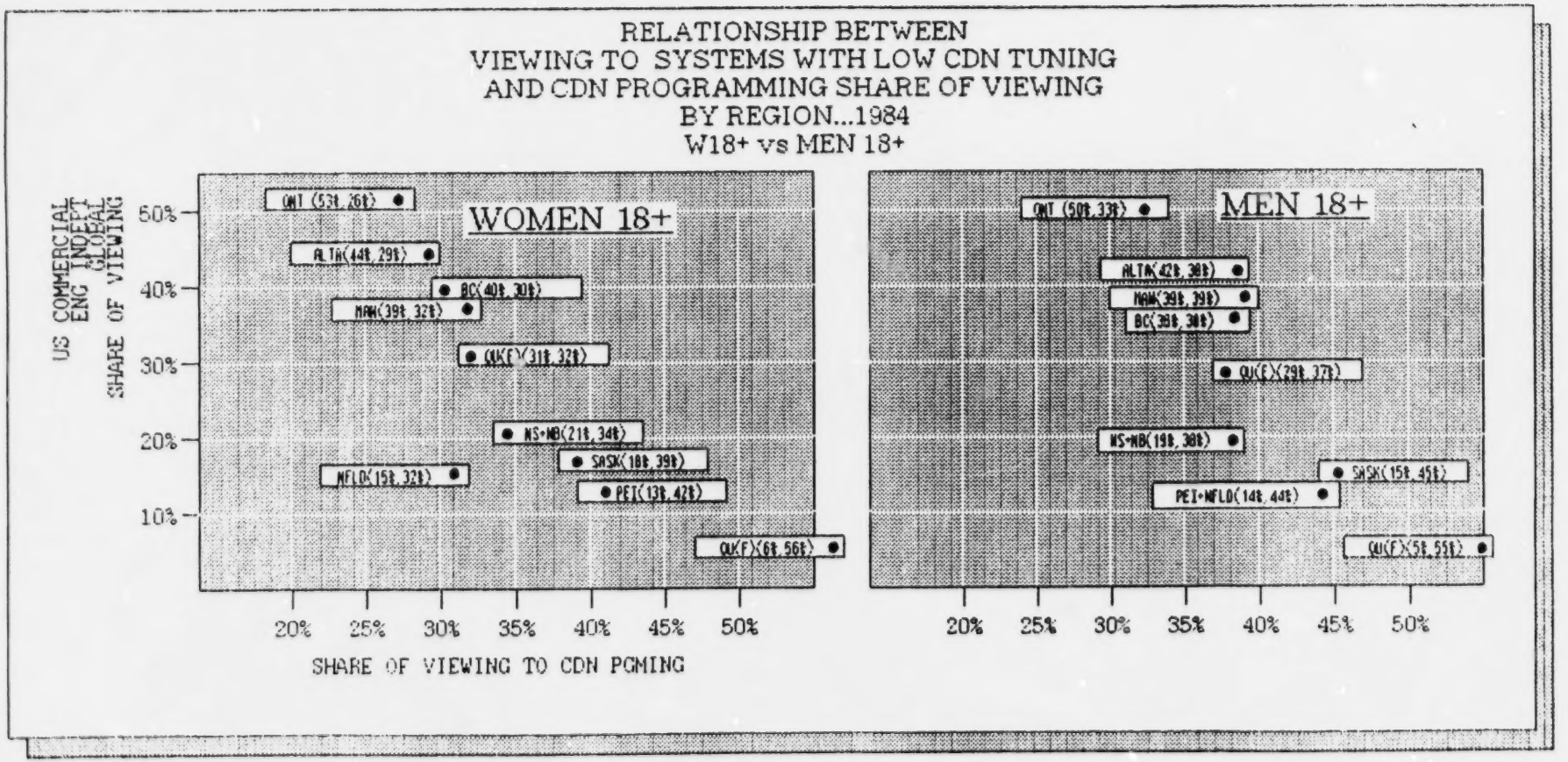
On page 40 of this study we conclude that the English CBC O+O/Affiliates poor share of tuning performance against Women 18+ was directly related to the high portion of time Women 18+ devote to Canadian programming. The opposite observation must be made with respect to Men 18+. In each region the CBC O+O/Affiliate Men 18+ share rank positions improve relative to the Women 18+ ranks and this can be directly related to Canadian programming. We will demonstrate that there is a particular type of Canadian programming that produces this growth in CBC share.

The chart on the following page examines the relationship between three TV systems total share of tuning by region, to the portion of the region's tuning that is directed to Canadian programming. The three TV systems identified are the three large systems that have relatively low ratios of Canadian program tuning... Global, the English Independents, and US Commercial.

The Women 18+ grid, that was first presented on page 25, is reproduced here and compared to a similar grid for Men 18+. Both are based upon the Fall'84 BBM survey.

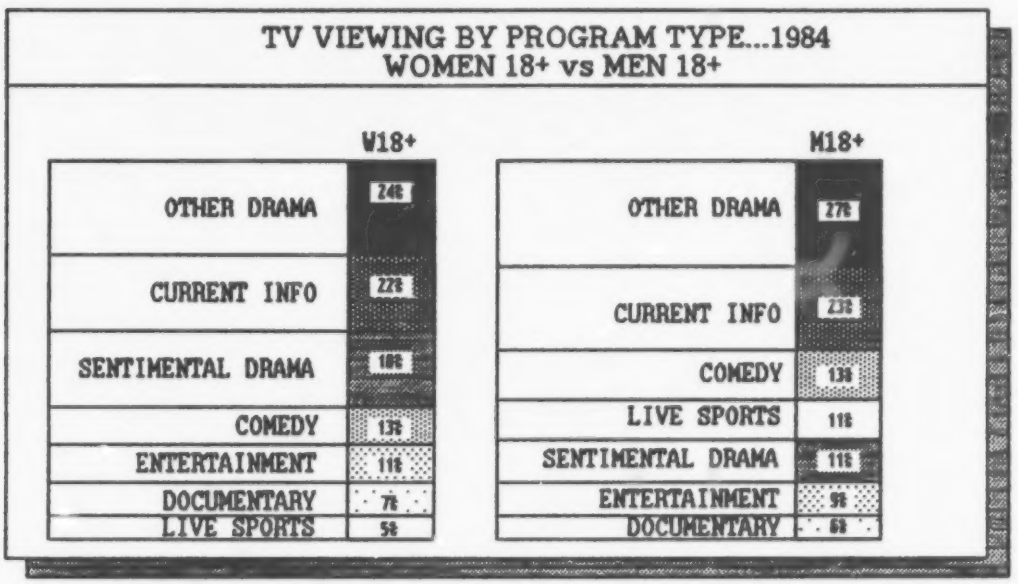
The general dynamic, that of declines in tuning to Canadian programming when the "non-Canadian Three" have tuning impact in a region, exists for Men 18+ just as it exists with Women 18+; but the dynamic is not as dramatic for Men 18+. The tendency for Men 18+ to search out Canadian programming relative to Women 18+ is the reason behind this difference.

RELATIONSHIP BETWEEN
VIEWING TO SYSTEMS WITH LOW CDN TUNING
AND CDN PROGRAMMING SHARE OF VIEWING
BY REGION...1984
W18+ vs MEN 18+



CANADIAN PROGRAM TUNING BY PROGRAM TYPE

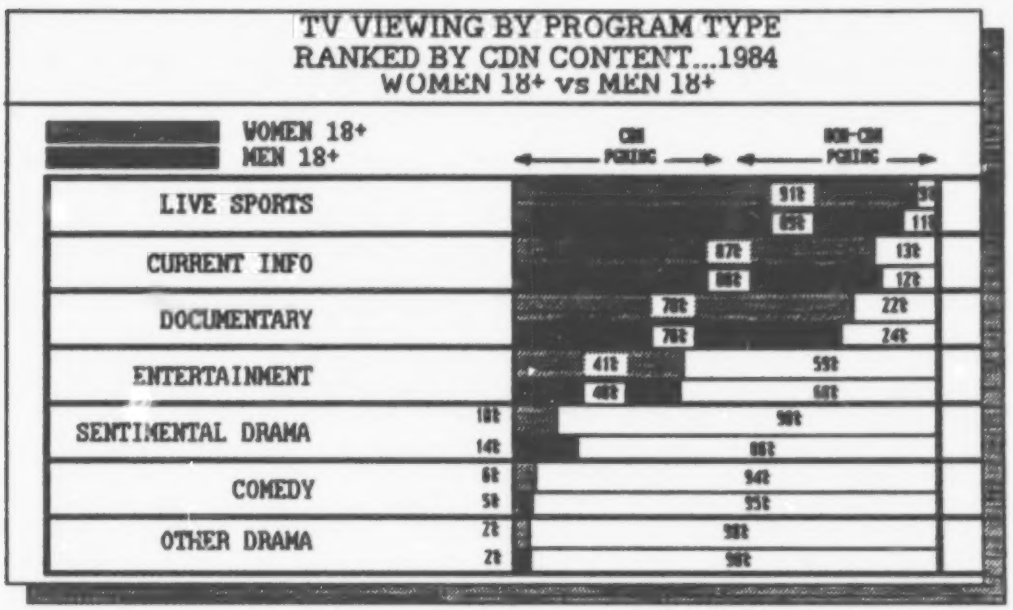
The chart below compares the shares of Men 18+ tuning captured by the different program types to Women 18+.



Two program types capture larger shares of Men 18+ tuning than Women... Other Drama and Live Sports; two have lower shares... Sentimental Drama and Entertainment; three are basically the same... Current Information, Comedy and Documentary.

The Canadian program tuning ratios for each of the program types are demonstrated on the following page.

This chart ranks the program types by Canadian programming tuning ratios. The Men 18+ rank is compared to the Women 18+ rank.



The Canadian programming ratios demonstrated by Men 18+ for these program types are very similar to the Women 18+ ratios. There is one exception... Sentimental Drama. Sentimental Drama is not the tuning force amongst Men that it is with Women but it draws a larger Canadian program tuning ratio amongst Men 18+.

The major difference between Men tuning by program type vs Women lies in Live Sports. If Men viewed program types the same way Women do, the Canadian program tuning ratio would be very similar to Women 18+...35%.

It is the large segment of tuning directed by Men 18+ to Live Sports, which is predominantly Canadian programming, that drives the Men 18+ Canadian program tuning ratio to 40%.

If fact Live Sports tuning propensity by Men 18+ also explains CBC O+O/Affiliates improved tuning performance nationally and each province relative to Women 18+.

The power of Live Sports to attract Men 18+ tuning explains how TV systems can increase share of Men 18+ tuning by increasing tuning to Canadian programming... a dynamic which works in reverse relative to Women 18+.

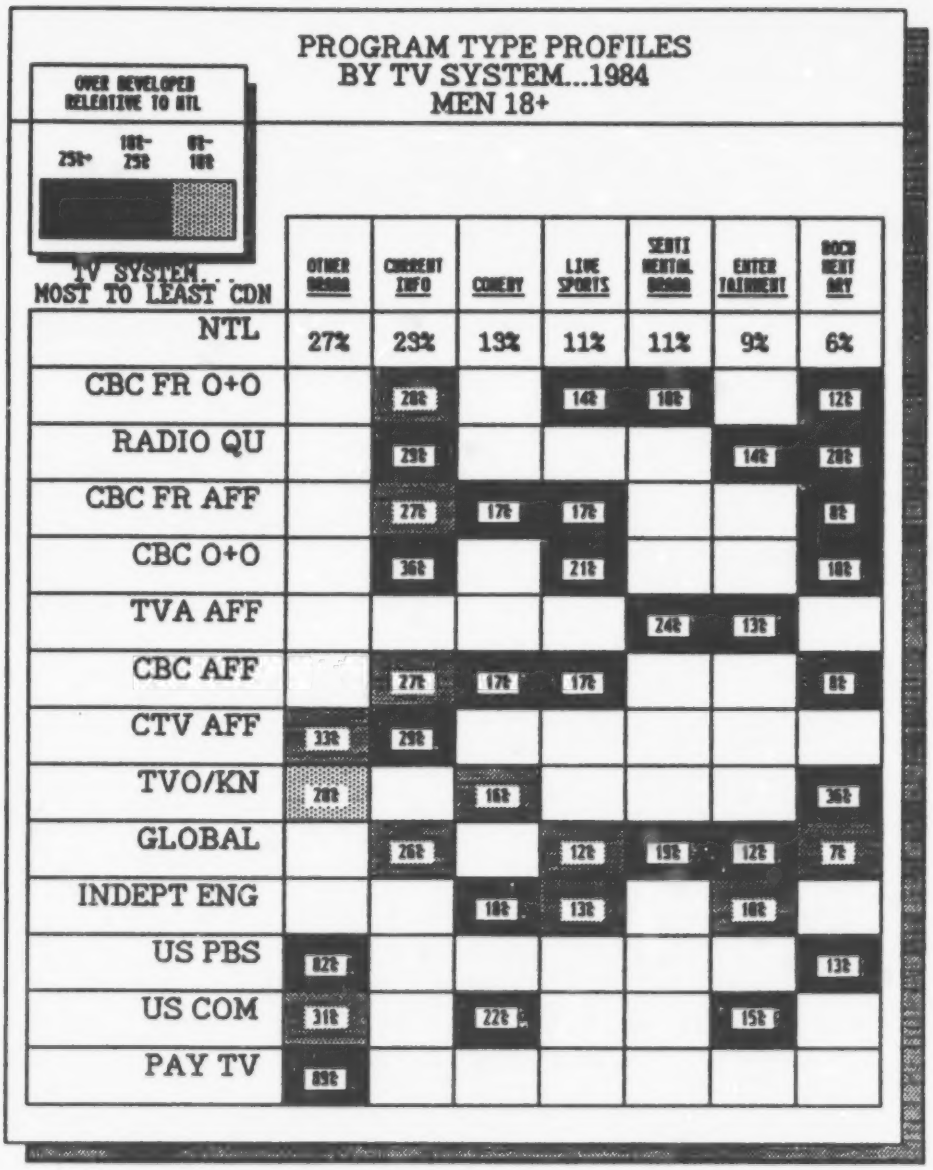
PROGRAM TYPE BY SYSTEMS

The chart on the following page replicates the Women 18+ chart (page 32) for Men 18+.

The Live Sports orientation demonstrated by the CBC O+O/Affiliates in both English and French Canada is clearly demonstrated on this chart.

A strong Documentary tuning pattern is exhibited by the English and French CBC O+O/Affiliates, by Radio Quebec, Global and particularly by TVO/Knowledge Network.

Dramatic differences in program type profiles by TV system exist amongst Men 18+ as we also observed amongst Women 18+.

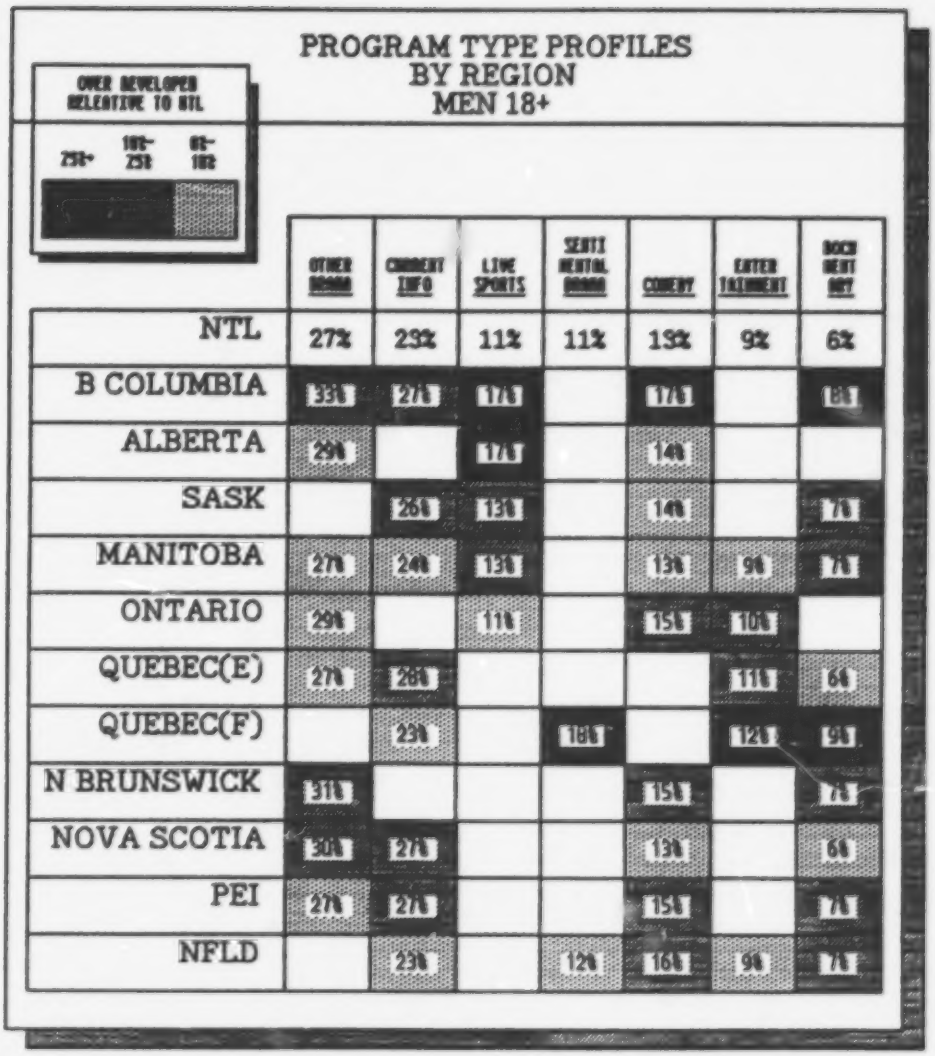

PROGRAM TYPE PROFILES
BY TV SYSTEM...1984
MEN 18+
OVER DEVELOPED
RELEATIVE TO NTL
25+
18-
25
6-
18
TV SYSTEM...
MOST TO LEAST CDN
OTHER DRAMA
CURRENT INFO
COMEDY
LIVE SPORTS
SEMI MENTAL DRAMA
ENTER TAINMENT
ROCK MENT ARY
NTL 27% 23% 13% 11% 11% 9% 6%
CBC FR O+O 20% 14% 10% 12%
RADIO QU 23% 14% 20%
CBC FR AFF 27% 17% 17% 8%
CBC O+O 36% 21% 10%
TVA AFF 24% 13%
CBC AFF 27% 17% 17% 8%
CTV AFF 33% 29%
TVO/KN 28% 16% 36%
GLOBAL 26% 12% 15% 12% 7%
INDEPT ENG 18% 13% 10%
US PBS 82% 13%
US COM 31% 22% 15%
PAY TV 89%

PROGRAM TYPE BY REGION

The chart on the following page demonstrates tuning by Men 18+ to different program type in various regions (replicates Women 18+ on page 34).

British Columbia and Quebec French Men 18+ seem to be the two regions of Canada that exhibit program type tuning patterns most dissimilar from the national patterns.

Live Sports tuning has a larger tuning following in the Western than in the Eastern provinces.


PROGRAM TYPE PROFILES
BY REGION
MEN 18+
OVER DEVELOPED
RELEATIVE TO NTL
25+
18-
25
65-
18
OTHER
CURRENT
INFO
LIVE
SPORTS
SERIOUS
MENTAL
COMEDY
ENTER
TAINMENT
ROCK
MENT
NOT
NTL 27% 23% 11% 11% 13% 9% 6%
B COLUMBIA 33% 27% 17% 17% 18%
ALBERTA 29% 17% 14%
SASK 26% 13% 14% 7%
MANITOBA 27% 24% 13% 13% 9% 7%
ONTARIO 29% 11% 15% 10%
QUEBEC(E) 27% 26% 11% 6%
QUEBEC(F) 23% 16% 12% 9%
N BRUNSWICK 31% 15% 7%
NOVA SCOTIA 30% 27% 13% 6%
PEI 27% 27% 15% 7%
NFLD 23% 12% 16% 9% 7%

MEN 18+ TV REACH, FALL'84

CANADIAN PROGRAM REACH BY REGION

The chart below compares shares of tuning and weekly reach captured by Canadian programming nationally and by province.

PORTION OF TV VIEWING TO CDN PROGRAMMING
BY REGION and WEEKLY REACH
1984, WOMEN 18+ vs MEN 18+

	SHARE OF HOURS		WKLY REACH	
REGION	W18+	M18+	W18+	M18+
NATIONAL	35%	40%	95%	95%
BC	30%	38%	95%	95%
ALTA	29%	38%	95%	97%
SASK	39%	45%	95%	94%
MAN	32%	39%	94%	95%
ONT	26%	33%	94%	95%
QU(E)	32%	37%	96%	95%
QU(F)	56%	55%	96%	95%
NB	34%	38%	94%	94%
NS	34%	41%	96%	96%
PEI	42%	44%	92%	97%
NFLD	32%	41%	95%	94%

Although Men 18+ spend 40% of their TV time viewing Canadian programming (vs Women 18+... 35%) the weekly reach levels generated by Canadian programming are the same for Men and Women.

Canadian programming reach levels do not vary dramatically by region but in Alberta and in PEI Canadian programming reaches slightly larger portions of Men than Women.

TV SYSTEM REACH

The chart below compares weekly reach and tuning shares between Men and Women, Fall '84.

NATIONAL SHARE OF TOTAL TV VIEWING
and WEEKLY REACH BY TV SYSTEM
1984, WOMEN 18+ vs MEN 18+

	SHARE OF HOURS		WEEKLY REACH	
SYSTEM	W18+	M18+	W18+	M18+
CTV AFFILIATE	23.5%	23.2%	75%	74%
US COMMERCIAL	21.2%	19.6%	65%	63%
TVA AFFILIATE	10.7%	9.8%	21%	21%
CBC O+O	10.5%	12.0%	54%	53%
ENGLISH INDEPT	8.7%	9.0%	41%	40%
CBC FR O+O	6.3%	5.8%	19%	18%
CBC AFFILIATE	5.8%	6.5%	29%	28%
GLOBAL	3.8%	3.4%	24%	22%
CBC FR AFFILIATE	2.6%	2.8%	8%	8%
US PBS	1.9%	2.0%	20%	19%
RADIO QUEBEC	1.2%	1.1%	11%	9%
PAY TV	1.2%	2.0%	7%	9%
TVO/KNOW. NET	.6%	.7%	10%	9%

TV systems in Canada produce marginally lower reach levels against Men 18+ than against Women... the exception being Pay TV.

This is even true for CBC O+O, the system that has a greater tuning impact on Men than on Women. We observed on page 40 of this study that, amongst Women 18+, the CBC O+O/Affiliate TV system produced the largest reach but third largest share of tuning. The same rank standing exists amongst Men 18+ but the CBC O+O/Affiliate share approaches that of the US Commercial system.

CANADIAN PROGRAM REACH BY SYSTEM

This chart provides, in addition to each system's total reach, the reach each system generates by it's Canadian and non-Canadian programming content.

NATIONAL TV SYSTEM TOTAL REACH
vs CDN AND NON-CDN REACH, 1984

	WOMEN 18+			MEN 18+		
SYSTEM	TOTAL WKLY RCH	CDN WKLY RCH	NON-CDN WKLY RCH	TOTAL WKLY RCH	CDN WKLY RCH	NON-CDN WKLY RCH
CTV AFFILIATE	75%	57%	69%	74%	59%	66%
US COMMERCIAL	65%	20%	62%	63%	22%	60%
CBC O+O	54%	45%	45%	53%	48%	39%
ENGLISH INDEPT	41%	24%	36%	40%	26%	34%
CBC AFFILIATE	29%	21%	25%	28%	21%	24%
GLOBAL	24%	14%	22%	22%	13%	20%
TVA AFFILIATE	21%	21%	21%	21%	20%	18%
US PBS	20%	2%	20%	19%	2%	19%
CBC FR O+O	19%	20%	19%	18%	17%	12%
RADIO QUEBEC	11%	10%	5%	9%	9%	4%
CBC FR AFFILIATE	8%	7%	7%	8%	7%	7%
TVO/KNOW. NET	10%	6%	8%	9%	5%	7%
PAY TV	7%	0%	5%	9%	1%	7%

Just as TV systems produce marginally lower reach of Men than Women (except for Pay TV), non-Canadian programming on the TV systems also produce lower reach levels. The Canadian programming portion of French language TV systems also produce lower Men reach levels than the reach against Women. The opposite is true of Canadian programming portion of English language TV systems. The Men 18+ reach levels in these cases are higher than their Women counterparts.

REACH OF PROGRAM TYPES

This chart compares shares of hours, Canadian and non-Canadian program reach of Men and Women by program type nationally.

TV VIEWING AND NTL REACH BY PROGRAM TYPE
CDN VS NON-CDN, FALL'84

WOMEN 18+	HOURS OF TUNING	WKLY REACH CDN PGMING	WKLY REACH NON-CDN PGMING
OTHER DRAMA	24%	23%	92%
CURRENT INFO	22%	89%	37%
SENTIMENTAL DRAMA	10%	26%	88%
COMEDY	13%	24%	82%
ENTERTAINMENT	11%	55%	58%
DOCUMENTARY	7%	66%	35%
LIVE SPORTS	5%	48%	8%

MEN 18+	HOURS OF TUNING	WKLY REACH CDN PGMING	WKLY REACH NON-CDN PGMING
OTHER DRAMA	27%	19%	91%
CURRENT INFO	23%	89%	35%
COMEDY	13%	19%	88%
LIVE SPORTS	11%	59%	15%
SENTIMENTAL DRAMA	11%	22%	64%
ENTERTAINMENT	9%	49%	54%
DOCUMENTARY	6%	62%	31%

Although TV systems generally produce larger reach against Men than Women for the Canadian programming portion of the schedule and lower reach for non-Canadian programming, the Canadian programming portion of each program type produces lower Men reach than Women 18+. The exception is naturally Live Sports. For this program type, Men reach levels for both Canadian and non-Canadian are higher than Live Sports reach of Women.

Just as Sentimental Drama attracts a far lower share of Men tuning than of Women tuning, the reach levels for Men are significantly lower than the Women reach levels.

REACH OF PROGRAM TYPE BY REGION

The charts following demonstrate the reach produced by program type of Men living in the provinces of Canada by Canadian programming (page 79) and non-Canadian programming (page 80). The comparable charts for Women 18+ are on pages 46 and 47.

The over development of reach by Canadian programming in Quebec French that was seen amongst Women 18+ is also observed amongst Men 18+. Canadian Live Sports produces higher than average reach in the Western provinces as well.

The non-Canadian programming portion of various program types generates above average reach generally in Ontario/West. Just as Comedy represented the exception for Women, it is the exception for Men. Comedy's non-Canadian programming delivers above average reach in all the English language regions.

CANADIAN PROGRAM TYPE REACH BY REGION, FALL'84 MEN 18+

REACH GREATER THAN NATIONAL

	OTHER DRAMA	CURRENT INFO	LIVE SPORTS	SEMI MENTAL DRAMA	COMEDY	ENTER TAINMENT	DOCU MENT ARY
NTL	19%	89%	59%	22%	19%	49%	62%
B COLUMBIA	13%	88%	61%	6%	7%	30%	57%
ALBERTA	18%	88%	70%	9%	10%	45%	58%
SASK	25%	90%	64%	13%	21%	53%	67%
MANITOBA	17%	87%	63%	6%	11%	39%	64%
ONTARIO	12%	87%	54%	8%	8%	43%	55%
QUEBEC(E)	21%	91%	52%	11%	14%	44%	58%
QUEBEC(F)	30%	91%	61%	62%	47%	68%	76%
N BRUNSWICK	25%	89%	53%	24%	24%	52%	66%
NOVA SCOTIA	32%	92%	55%	25%	16%	58%	71%
PEI	39%	92%	64%	28%	25%	55%	71%
NFLD	44%	88%	62%	17%	21%	63%	67%

NON-CANADIAN PROGRAM TYPE REACH BY REGION, FALL'84 MEN 18+

REACH GREATER THAN NATIONAL

	OTHER DRAMA	CURRENT INFO	LIVE SPORTS	SEMI MENTAL DRAMA	COMEDY	ENTER TAINMENT	ROCK MENT ARY
NTL	91%	35%	15%	64%	80%	54%	31%
B COLUMBIA	93%	56%	17%	61%	83%	63%	38%
ALBERTA	94%	42%	18%	59%	87%	59%	27%
SASK	89%	22%	10%	64%	86%	50%	30%
MANITOBA	93%	28%	12%	64%	85%	56%	38%
ONTARIO	94%	47%	22%	61%	85%	65%	31%
QUEBEC(E)	96%	43%	15%	57%	82%	67%	30%
QUEBEC(F)	85%	8%	4%	70%	60%	30%	26%
N BRUNSWICK	92%	24%	8%	64%	86%	46%	31%
NOVA SCOTIA	93%	27%	10%	67%	86%	36%	29%
PEI	90%	18%	7%	67%	87%	28%	23%
NFLD	89%	22%	8%	71%	91%	58%	34%

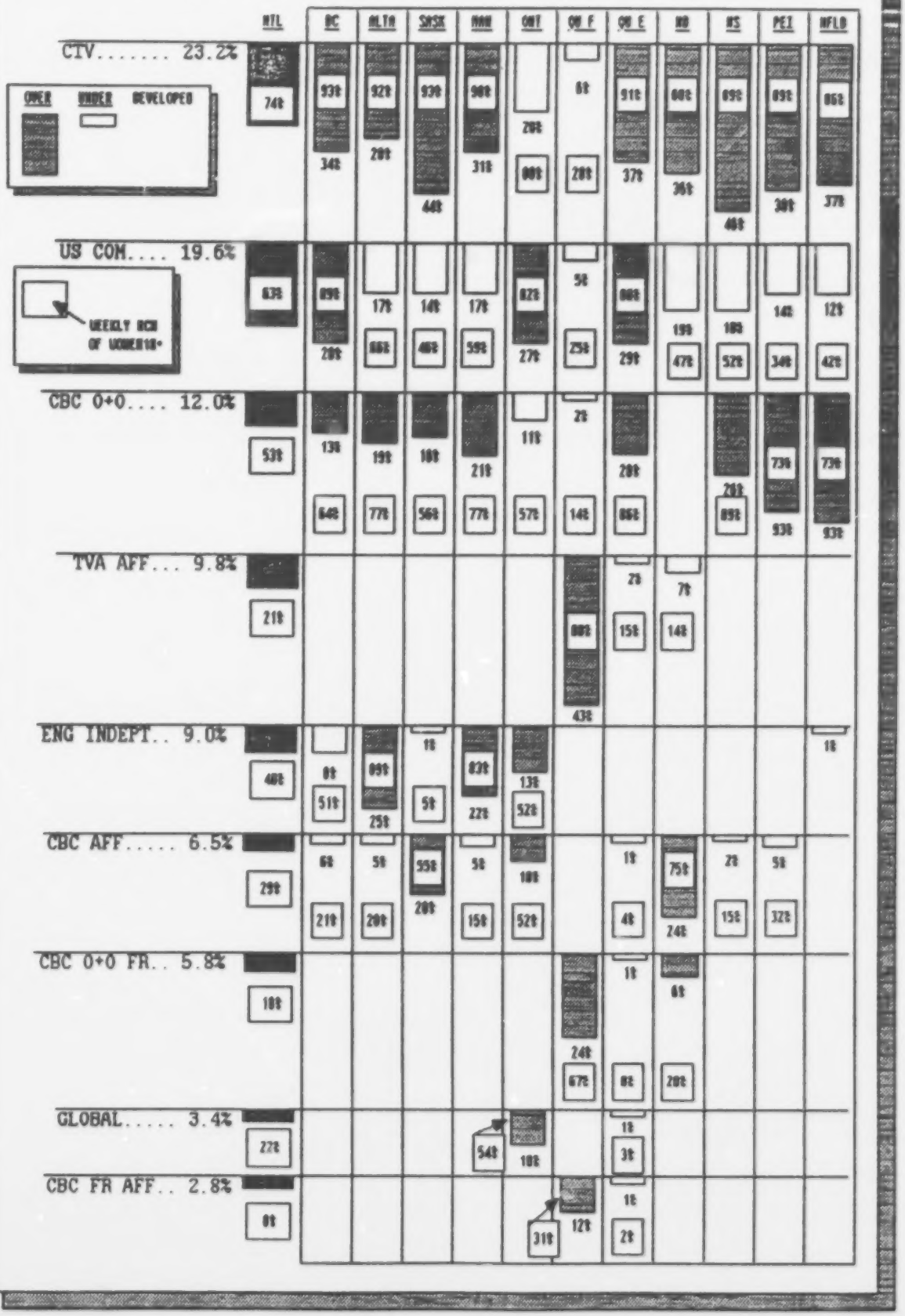
SYSTEM REACH BY REGION

The chart on the following page lays reach information onto share of Men 18+ tuning by system by region.

The comparable chart for Women 18+ on page 49.

The reach data on this chart is quite predictable. The relationship TV systems demonstrate between national reach and provincial reach are very similar between Men and Women 18+.

SYSTEM SHARES OF TV TUNING BY REGION
WITH MEN 18+ WEEKLY REACH, FALL '94



2-17 YEAR OLD TV HOURS, FALL'84

CANADIAN PROGRAM VIEWING BY REGION

The 2-17 year old population view less TV than Women 18+, and also spend lower portions of their TV time with Canadian programming... 28% vs Women 18+ at 35%. The chart below also demonstrates the Canadian programming portions of 2-17 year old's TV time in the provinces. The low Canadian programming ratios which exist in both English and French Canada, are particularly low in BC and surprisingly low in Saskatchewan where Canadian program tuning ratios have tended to be relatively high for Women and Men 18+.

PORTION OF TV VIEWING TO CDN PROGRAMMING
BY REGION, 1984
WOMEN 18+ vs 2-17 YR OLDS

REGION	W18+	2-17	2-17 INDEX TO W18+
NATIONAL	35%	28%	80
BC	30%	17%	57
ALTA	29%	24%	83
SASK	39%	26%	67
MAN	32%	22%	69
ONT	26%	21%	81
QU(E)	32%	26%	81
QU(F)	56%	47%	84
NB	34%	26%	76
NS	34%	28%	82
PEI	42%	32%	76
NFLD	32%	31%	97

SHARES OF VIEWING BY SYSTEM

The chart below compares 2-17 year old TV system shares to system shares for Women 18+.

NATIONAL SHARE OF TOTAL TV VIEWING
BY TV SYSTEM, 1984
WOMEN 18+ vs 2-17 YR OLDS

SYSTEM	W18+	SYSTEM	2-17
CTV AFFILIATE	23.5%	US COMMERCIAL	23.7%
US COMMERCIAL	21.2%	CTV AFFILIATE	18.4%
TVA AFFILIATE	10.7%	CBC O+O	10.4%
CBC O+O	10.5%	TVA AFFILIATE	9.3%
ENGLISH INDEPT	8.7%	ENGLISH INDEPT	7.6%
CBC FR O+O	6.3%	CBC AFFILIATE	6.9%
CBC AFFILIATE	5.8%	CBC FR O+O	6.1%
GLOBAL	3.8%	GLOBAL	3.7%
CBC FR AFFILIATE	2.6%	CBC FR AFFILIATE	3.5%
US PBS	1.9%	US PBS	2.2%
RADIO QUEBEC	1.2%	PAY TV	1.7%
PAY TV	1.2%	TVO/KNOW. NET	1.9%
TVO/KNOW. NET	.6%	RADIO QUEBEC	1.5%

The system shares for 2-17 year olds are very different than system shares for Women 18+. The most dramatic difference occurs with the US Commercial system (higher than Women) and the CTV system (lower than Women).

Other differences include TVA, English Independents, CBC French O+O which have lower 2-17 year old shares than Women 18+... CBC Affiliates, CBC French Affiliates, US PBS, Pay TV and (most dramatic) TVO/Knowledge Network which have 2-17 year old shares larger than Women 18+. The TVO/Knowledge Network share amongst 2-17 year olds, although small, is three times larger than that systems share of Women 18+ tuning.

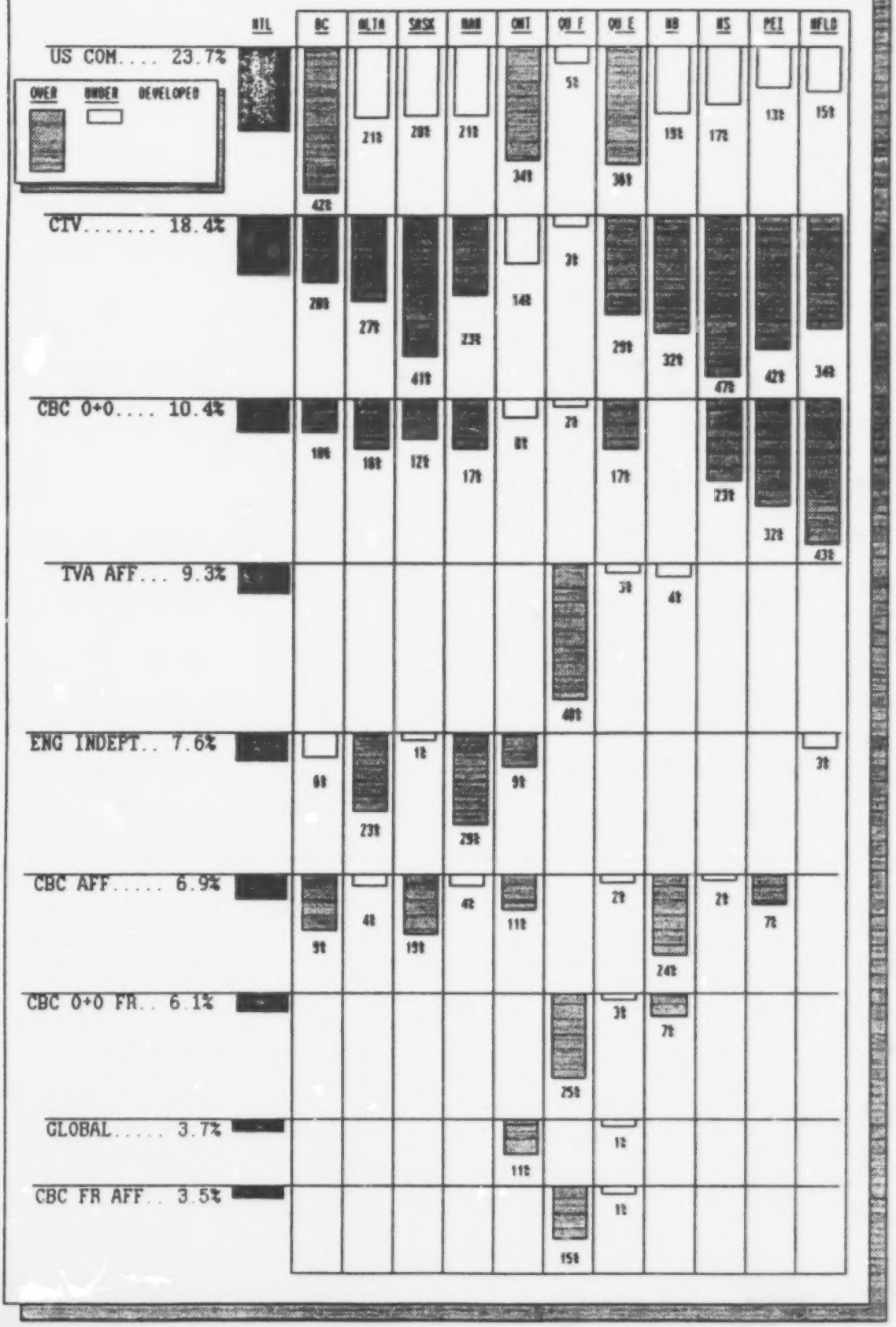
TUNING BY SYSTEM BY REGION

The chart on the following page demonstrates the shares of 2-17 year old TV tuning captured by the various TV systems.

There are a few noticeable pattern differences in system shares by region...2-17 year olds vs Women 18+. The major difference occurs in BC where US Commercial and CBC Affiliates hold larger 2-17 year old shares than their shares of Women tuning. The CTV system's share of 2-17 year olds is much diminished from their dominant Women position.

In Manitoba the English Independent system takes over the number one 2-17 year share position... a position held by the CTV system against Women.

SYSTEM SHARES OF TV TUNING BY REGION...1984
2-17 YR OLDS



VIEWING TO CANADIAN PROGRAMMING BY SYSTEM

This chart, which compares each TV systems' "Canadian" tuning ratios, 2-17 year olds vs Women 18+, demonstrates some very dramatic differences. For example CBC French O+O draws 77% of it's Women tuning but only 55% of it's 2-17 year old tuning through Canadian programming. The only systems that draw higher "Canadian" tuning ratios for 2-17 year olds, relative to Women, are Radio Quebec, TVO/Knowledge Network, CBC Affiliates and English Independents.

PORTION OF TV VIEWING TO CDN PROGRAMMING
1984
WOMEN 18+ vs 2-17 YR OLDS

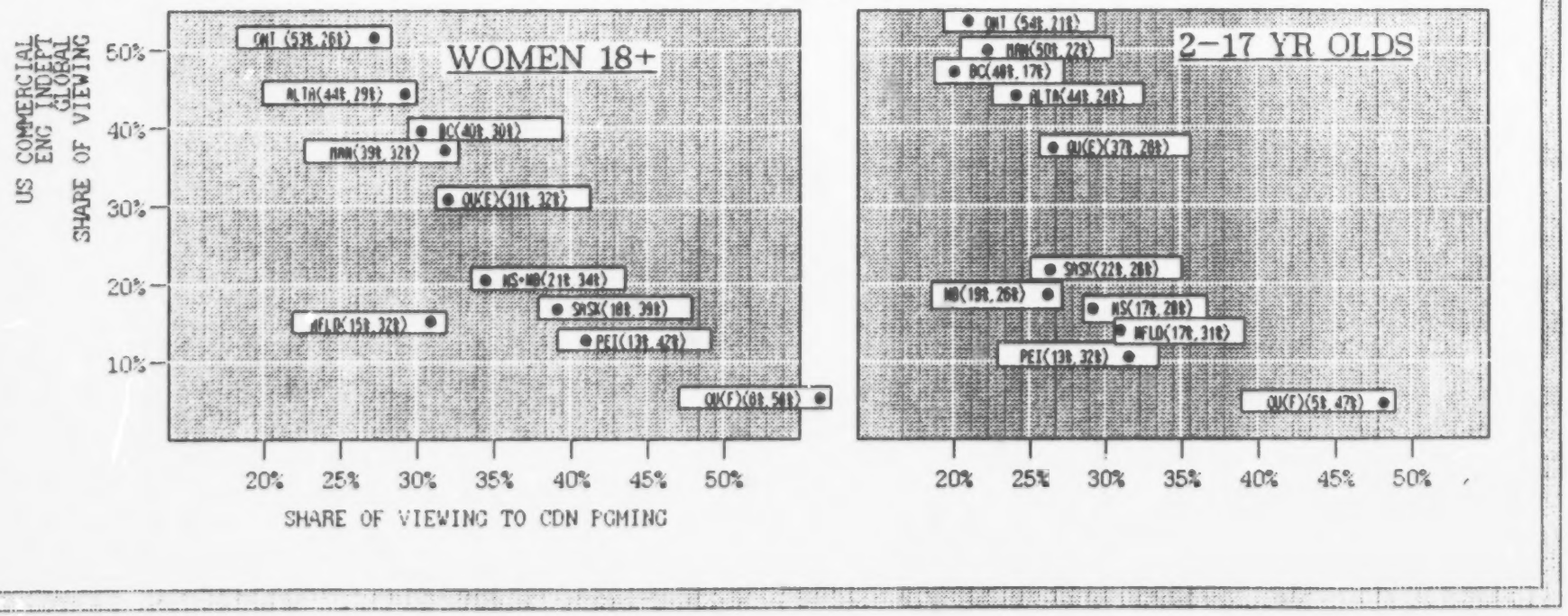
W18+		2-17	
SYSTEM RANKED FROM HOST TO LEAST CDN PGMING		SYSTEM RANKED FROM HOST TO LEAST CDN PGMING	
CBC FR O+O	77%	RADIO QUEBEC	78%
RADIO QUEBEC	72%	CBC FR O+O	55%
CBC FR AFFILIATE	64%	CBC ENG O+O	52%
CBC ENG O+O	63%	TVA AFFILIATE	50%
TVA AFFILIATE	53%	CBC AFFILIATE	49%
CBC AFFILIATE	45%	TVO/KNOW.NET.	46%
CTV AFFILIATE	36%	CBC FR AFFILIATE	35%
TVO/KNOW.NET.	35%	ENG INDEPT.	27%
GLOBAL.	30%	CTV AFFILIATE	25%
ENG INDEPT.	23%	GLOBAL.	21%
US PBS	5%	US COMMERCIAL	4%
US COMMERCIAL	4%	US PBS	4%
PAY TV	1%	PAY TV	1%

In the Women and Men tuning portions of this study, the three TV systems that had the lowest Canadian programming tuning ratios were grouped into the "Three Non-Canadian" segment, their share of tuning in each province determined, and the portion of each region's tuning directed to Canadian programming determined. The regions were plotted according to the "Three Non-Canadian" shares and by the regions' Canadian tuning ratio. The three systems were US Commercial, Global and English Independents. There are four TV systems that demonstrate below average Canadian tuning ratios for 2-17 year olds... CTV has a below average Canadian programming tuning ratio.

We replicated the Women and Men grid on the following page using the original "Three Non-Canadian" systems.

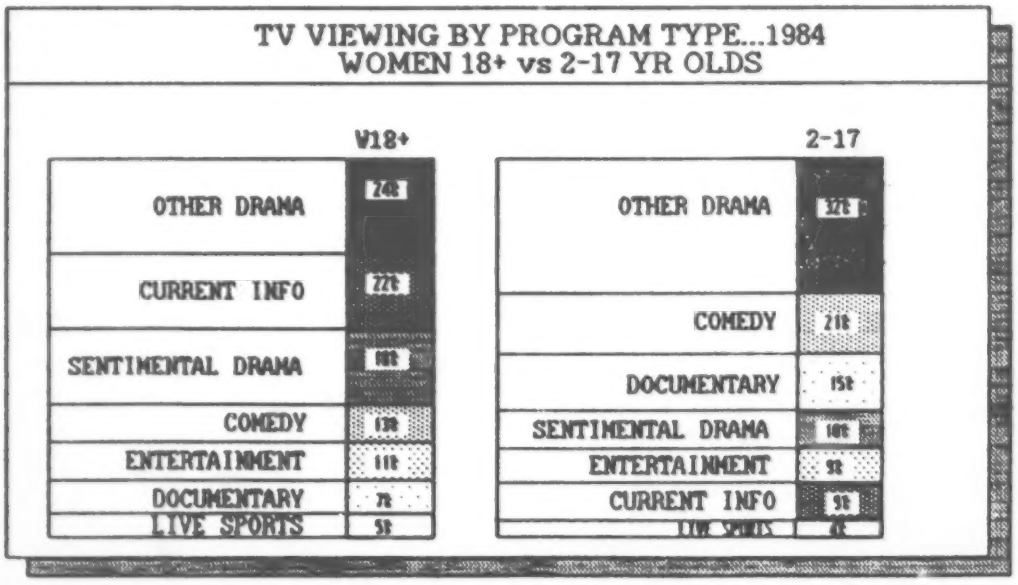
This chart confirms previous Women and Men observations for this 2-17 year old target... the most fragmented provinces, provinces that have high shares of tuning to Global, English Independents and US Commercial, tend to have lower degrees of tuning to Canadian programming.

RELATIONSHIP BETWEEN
VIEWING TO SYSTEMS WITH LOW CDN TUNING
AND CDN PROGRAMMING SHARE OF VIEWING
BY REGION...1984
W18+ vs 2-17 YR OLDS

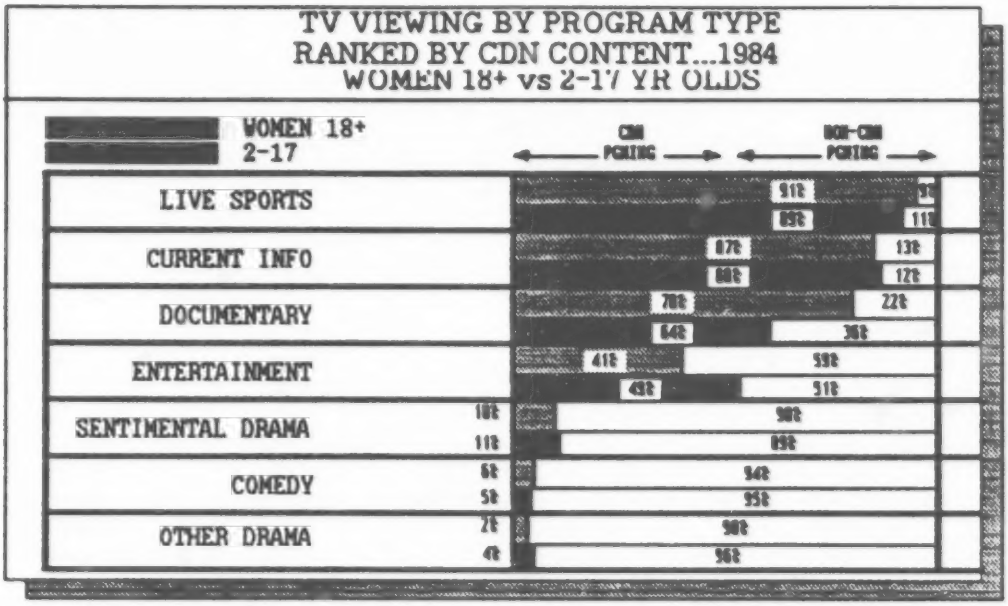


CANADIAN PROGRAM TUNING BY PROGRAM TYPE

The mix of TV program types 2-17 year olds view is very different than the distribution of Women 18+ hours by program type. The 2-17 year old target spend a larger portion of their TV time with Other Drama, Comedy and Documentary and less of their time with Live Sports, Sentimental Drama, Entertainment (minor difference) and Current Information then Women. The biggest degree of difference in this regard, on the positive side, is Documentary. This program type includes Music programming and probably reflects the growth in Video Hits type of TV shows. The biggest difference on the negative side is in the Current Information program type. 22% of Women TV time is spent with Current Information but only 9% of 2-17 year old weekly TV hours is directed to this type of program.



The portions of the program types that draw their 2-17 year old tuning through Canadian programs are compared to Women 18+ below.



The 2-17 year old "Canadian" tuning component in these program types are generally similar to Women "Canadian" tuning ratios with two exceptions... Documentary which amongst the 2-17 target has a heavier non-Canadian tuning ratio and Entertainment which has a heavier Canadian tuning ratio then Women 18+.

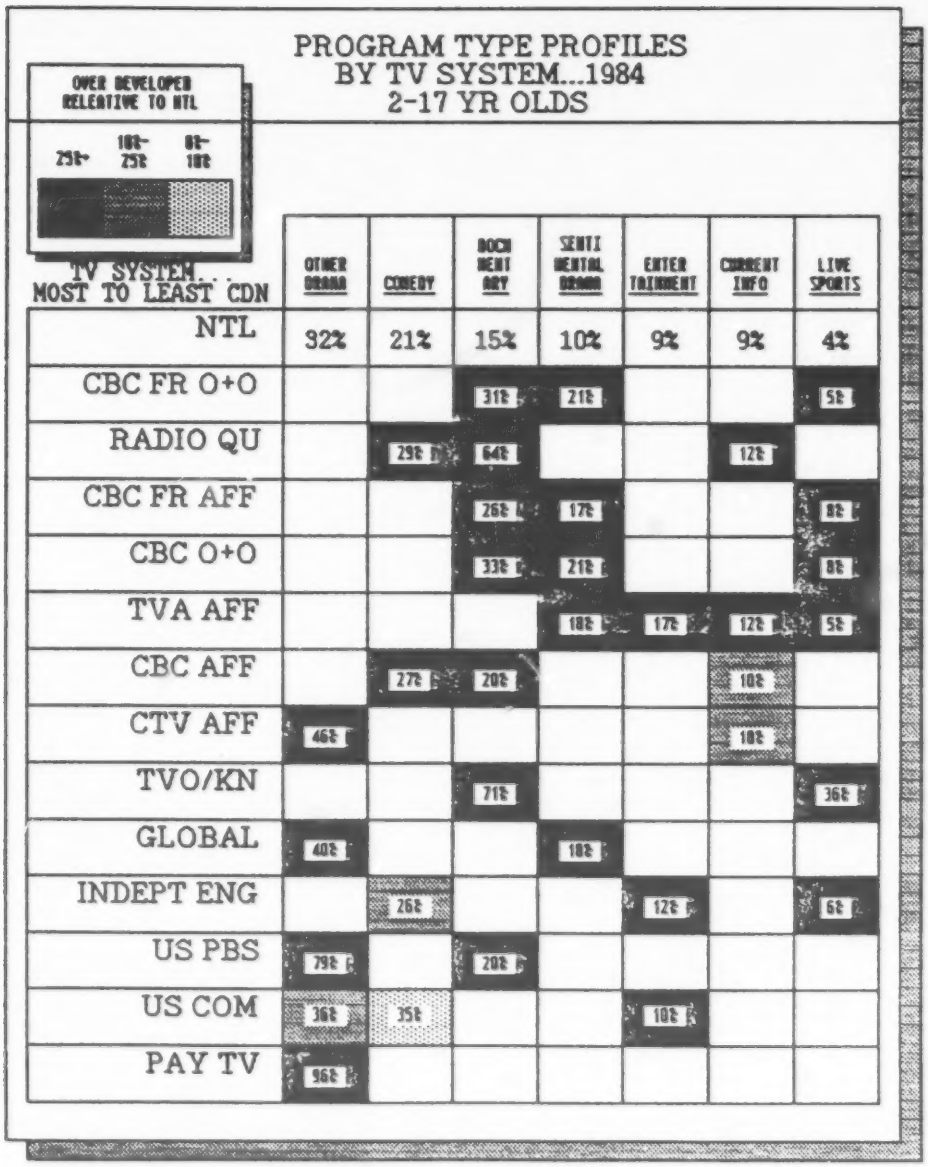
It is the 2-17 year old's tendency not to view Current Information and Live Sports programs that produces the low levels of total Canadian programming TV viewing.

PROGRAM TYPE BY SYSTEMS

The chart on the following page describes the program type profiles exhibited by each of the TV systems. This can be compared to the comparable chart for Women on page 32. The most distinguishing feature concerning this chart is the extreme degree of difference that exists between systems and between most systems and the national averages.

Children's programs, many of which would be included in the Documentary program type, account for the over development seen for the TVO/Knowledge Network. Video Music programs, appealing to teens, produces the "Documentary" skews demonstrated in the CBC O+O/Affiliate English and French systems.

The only system that does not vary dramatically from the national program type profile is the US Commercial system.

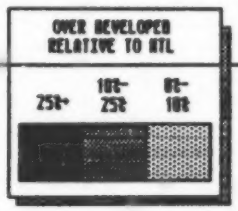

PROGRAM TYPE PROFILES
BY TV SYSTEM...1984
2-17 YR OLDS
OVER DEVELOPED RELEATIVE TO NTL
TV SYSTEM... MOST TO LEAST CDN
OTHER DRAMA
COMEDY
ROCK MENT ARY
SEMI MENTAL DRAMA
ENTER TAINMENT
CURRENT INFO
LIVE SPORTS
NTL 32% 21% 15% 10% 9% 9% 4%
CBC FR O+O
RADIO QU
CBC FR AFF
CBC O+O
TVA AFF
CBC AFF
CTV AFF
TVO/KN
GLOBAL
INDEPT ENG
US PBS
US COM
PAY TV

PROGRAM TYPE BY REGION

As usual, Quebec French demonstrates the greatest degree of difference from the national program type profile with Sentimental Drama, Documentary and Entertainment viewing skews by the 2-17 year old population.

The is also a slightly higher degree of Current Information tuning exhibited amongst 2-17 year olds in the three Eastern-most provinces.

PROGRAM TYPE PROFILES
BY REGION
KIDS 2-17



	OTHER DRAMA	COMEDY	DOCUMENTARY	SEMI DRAMA	ENTERTAINMENT	CURRENT INFO	LIVE SPORTS
NTL	32%	21%	15%	10%	9%	9%	4%
B COLUMBIA	38%						5%
ALBERTA	35%	24%					5%
SASK		24%				10%	
MANITOBA	33%	27%					5%
ONTARIO	35%	25%					
QUEBEC(E)		26%				13%	
QUEBEC(F)			22%	16%	12%	10%	
N BRUNSWICK	39%						
NOVA SCOTIA	38%					13%	
PEI	33%		16%			13%	5%
NFLD			17%	12%	11%	12%	

2-17 YEAR OLD TV REACH, FALL'84

CANADIAN PROGRAM REACH BY REGION

The TV medium reaches 96% of the 2-17 year old population. The chart below indicates that the Canadian programming portion of the TV medium reaches 89% of this group. The 2-17 year old practices Canadian programming avoidance to a larger degree than Women or Men 18+.

The Canadian programming reach levels are higher in the four eastern provinces, below the national average in Quebec French, and particularly low in BC.

PORTION OF TV VIEWING TO CDN PROGRAMMING
BY REGION and WEEKLY REACH
1984, WOMEN 18+ vs 2-17 YR OLDS

	SHARE OF HOURS		WKLY REACH	
REGION	W18+	2-17	W18+	2-17
NATIONAL	35%	28%	95%	89%
BC	30%	17%	95%	83%
ALTA	29%	24%	95%	87%
SASK	39%	26%	95%	93%
MAN	32%	22%	94%	91%
ONT	26%	21%	94%	86%
QU(E)	32%	26%	96%	96%
QU(F)	56%	47%	96%	86%
NB	34%	26%	94%	91%
NS	34%	28%	96%	92%
PEI	42%	32%	92%	96%
NFLD	32%	31%	95%	90%

TV SYSTEM REACH

As dominant as the US Commercial system is amongst 2-17 year olds, the reach level produced is lower than the US Commercial system's reach of Women 18+. Relative to Women 18+ five other systems have lower 2-17 year old reach levels than their Women 18+ reach levels... CTV, TVA, CBC O+O, and Global. Three systems generate 2-17 year old reach levels that are comparable to their Women 18+ reach... English Independents, CBC French O+O, and Radio Quebec. The remaining systems generate 2-17 year old reach levels higher then the Women reach levels... CBC Affiliate, CBC Frecnh Affiliate, TVO/Knowledge Network and Pay TV.

NATIONAL SHARE OF TOTAL TV VIEWING
and WEEKLY REACH BY TV SYSTEM
1984, WOMEN 18+ vs 2-17 YR OLDS

	SHARE OF HOURS		WEEKLY REACH	
SYSTEM	W18+	2-17	W18+	2-17
CTV AFFILIATE	23.5%	18.4%	75%	66%
US COMMERCIAL	21.2%	23.7%	65%	60%
TVA AFFILIATE	10.7%	9.3%	21%	19%
CBC O+O	10.5%	10.4%	54%	49%
ENGLISH INDEPT	8.7%	7.6%	41%	41%
CBC FR O+O	6.3%	6.1%	19%	19%
CBC AFFILIATE	5.8%	6.9%	29%	31%
GLOBAL	3.8%	3.7%	24%	21%
CBC FR AFFILIATE	2.6%	3.5%	8%	9%
US PBS	1.9%	2.2%	20%	17%
RADIO QUEBEC	1.2%	1.5%	11%	11%
PAY TV	1.2%	1.7%	7%	8%
TVO/KNOW. NET	.6%	1.9%	10%	14%

CANADIAN PROGRAM REACH BY SYSTEM

This chart compares 2-17 year old reach to Women 18+ reach for TV systems... totally and the Canadian and non-Canadian programming segments.

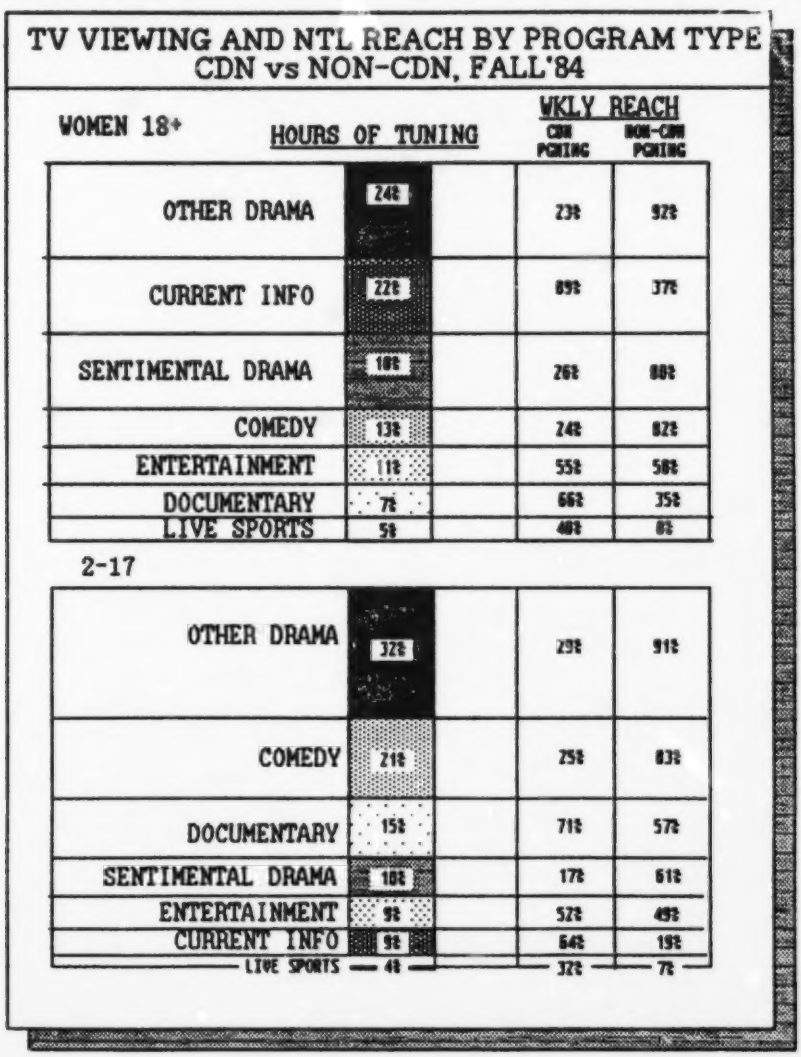
NATIONAL TV SYSTEM TOTAL REACH
vs CDN AND NON-CDN REACH, 1984

	WOMEN 18+			2-17		
SYSTEM	TOTAL WKLY RCH	CDN WKLY RCH	NON-CDN WKLY RCH	TOTAL WKLY RCH	CDN WKLY RCH	NON-CDN WKLY RCH
CTV AFFILIATE	75%	57%	69%	66%	42%	61%
US COMMERCIAL	65%	20%	62%	60%	17%	58%
CBC O+O	54%	45%	45%	49%	40%	42%
ENGLISH INDEPT	41%	24%	36%	41%	20%	29%
CBC AFFILIATE	29%	21%	25%	31%	21%	27%
GLOBAL	24%	14%	22%	21%	11%	20%
TVA AFFILIATE	21%	21%	21%	19%	18%	18%
US PBS	20%	2%	20%	17%	2%	17%
CBC FR O+O	19%	20%	19%	19%	16%	16%
RADIO QUEBEC	11%	10%	5%	11%	11%	6%
CBC FR AFFILIATE	8%	7%	7%	9%	7%	8%
TVO/KNOW. NET	10%	6%	8%	14%	10%	12%
PAY TV	7%	0%	5%	8%	0%	6%

There are only three TV systems that generate 2-17 year old reach levels with Canadian programming equal to or greater than the non-Canadian reach... TVA, CBC French O+O and Radio Quebec. In most respects the Canadian programming ratios for these systems for 2-17 year olds are similar to the Women 18+ ratios.

REACH OF PROGRAM TYPES

The reach produced by the Canadian and non-Canadian segments for the seven program types is described in this chart.


TV VIEWING AND NTL REACH BY PROGRAM TYPE
CDN vs NON-CDN, FALL'84
WOMEN 18+
HOURS OF TUNING
WKLY REACH
CDN PGMNG
NON-CDN PGMNG
OTHER DRAMA 24% 23% 92%
CURRENT INFO 22% 89% 37%
SENTIMENTAL DRAMA 18% 26% 88%
COMEDY 13% 24% 82%
ENTERTAINMENT 11% 55% 58%
DOCUMENTARY 7% 66% 35%
LIVE SPORTS 5% 40% 8%
2-17
OTHER DRAMA 32% 29% 91%
COMEDY 21% 25% 83%
DOCUMENTARY 15% 71% 57%
SENTIMENTAL DRAMA 10% 17% 61%
ENTERTAINMENT 9% 52% 49%
CURRENT INFO 9% 64% 19%
LIVE SPORTS 4% 32% 7%

The Canadian and non-Canadian reach levels against 2-17 year olds are similar to Women 18+ reach levels in all respects but one... Entertainment. The Entertainment Canadian reach level is larger than the non-Canadian level. This parallels the Canadian vs non-Canadian share of hours 2-17 year olds demonstrate with this program type.

REACH OF PROGRAM TYPE BY REGION

The following page shows the Canadian programming reach of various program types by region. The regional pattern here is comparable to the chart for Women 18+ on page 46... a Canadian programming skew exists in the Quebec French and Atlantic part of the country.

The non-Canadian programming reach of program type by region however is quite different than the comparable Women chart which appears on page 47. All regions in Canada, except Quebec English and Saskatchewan, demonstrate non-Canadian reach levels higher than the average for the country.

CANADIAN PROGRAM TYPE REACH BY REGION, FALL'84 KIDS 2-17

GREATER REACH THAN NATIONAL

	OTHER DRAMA	COMEDY	DOCUMENTARY	SEMI DRAMA	ENTERTAINMENT	CURRENT INFO	LIVE SPORTS
NTL	29%	25%	71%	17%	52%	64%	32%
B COLUMBIA	18%	13%	56%	5%	34%	52%	27%
ALBERTA	33%	17%	70%	7%	49%	62%	35%
SASK	41%	30%	73%	11%	58%	73%	32%
MANITOBA	35%	24%	71%	6%	47%	62%	38%
ONTARIO	26%	14%	65%	8%	45%	58%	30%
QUEBEC(E)	16%	21%	55%	9%	38%	56%	26%
QUEBEC(F)	28%	46%	89%	46%	72%	76%	35%
N BRUNSWICK	36%	29%	72%	19%	61%	73%	30%
NOVA SCOTIA	39%	24%	77%	16%	59%	81%	31%
PEI	43%	31%	81%	22%	56%	81%	37%
NFLD	46%	44%	77%	14%	70%	77%	37%

CANADIAN PROGRAM TYPE REACH BY REGION, FALL'84 KIDS 2-17

GREATER REACH THAN NATIONAL

	OTHER DRAMA	COMEDY	ROCK MENT ART	SEMI MENTAL DRAMA	ENTER TAINMENT	CURRENT INFO	LIVE SPORTS
NTL	91%	89%	57%	61%	49%	19%	7%
B COLUMBIA	92%	80%	54%	42%	51%	28%	6%
ALBERTA	91%	85%	53%	57%	55%	23%	8%
SASK	91%	90%	54%	61%	48%	16%	6%
MANITOBA	93%	90%	61%	59%	64%	13%	7%
ONTARIO	92%	86%	58%	56%	59%	26%	10%
QUEBEC(E)	76%	72%	48%	41%	27%	3%	8%
QUEBEC(F)	91%	76%	56%	81%	56%	21%	1%
N BRUNSWICK	91%	88%	62%	68%	38%	12%	12%
NOVA SCOTIA	93%	92%	59%	67%	34%	16%	6%
PEI	93%	90%	59%	62%	28%	12%	3%
NFLD	90%	90%	65%	66%	63%	19%	5%

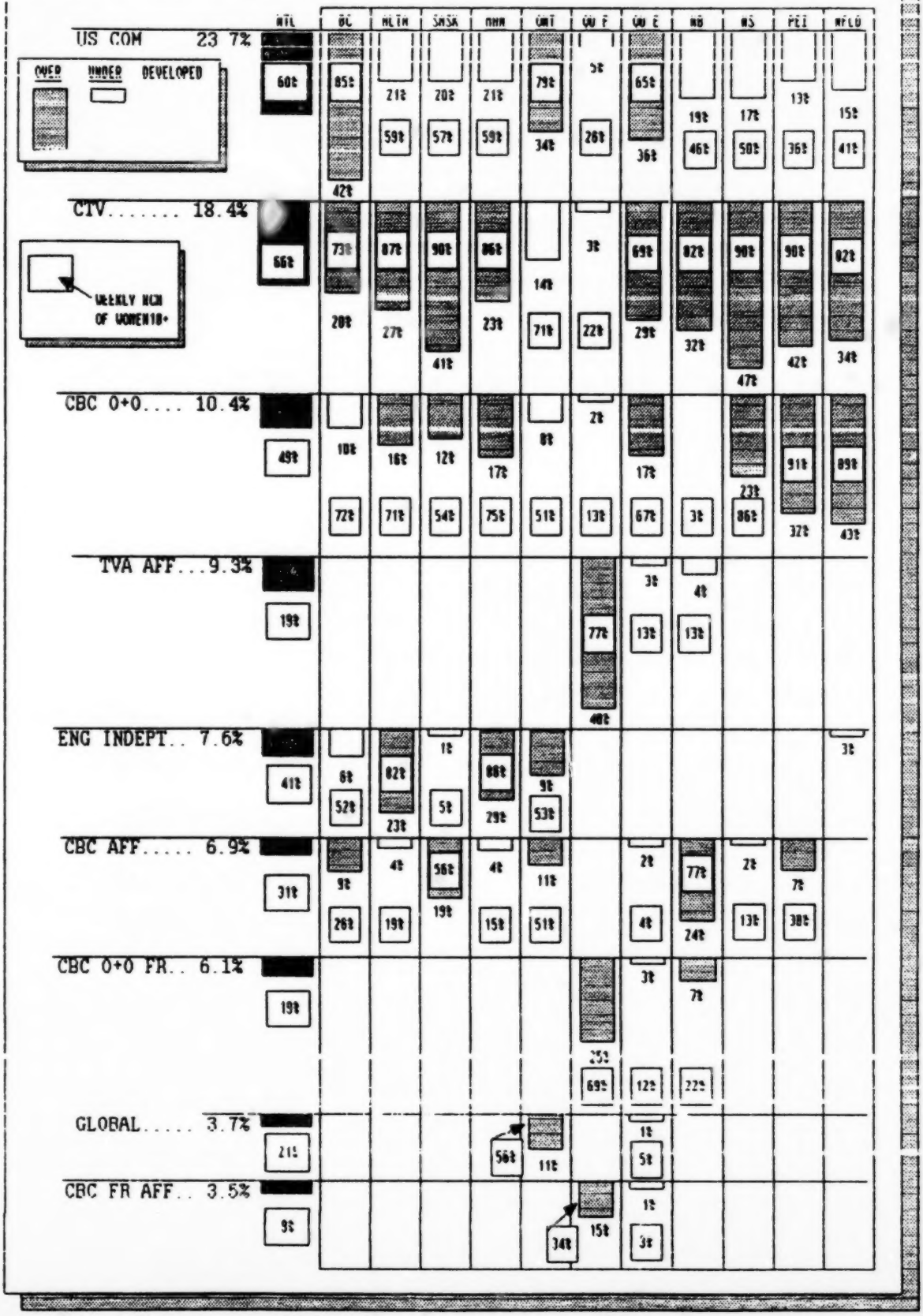
TV SYSTEM REACH BY REGION

The following page contains TV system reach data, by region, for the 2-17 year old target.

Of note is the fact that the US Commercial TV system has a lower weekly reach against 2-17 year olds than the CTV network even though the US Commercial system enjoys a significant edge in share of hours.

This is due to the advantage, US Commercial over CTV, concentrates in the province of BC thereby limiting the system's possible national reach.

SYSTEM SHARES OF TV TUNING BY REGION
WITH 2 17 YR OLD WEEKLY REACH, FALL'84



IN SUMMARY

Throughout this report we have made observations, we have suggested why certain TV viewing behavior exists, we have also created hypotheses. This section of the report summarizes these points with an emphasis on viewing Canadian TV programming.

1) Canadians spend about one third of their weekly TV viewing time with Canadian programming. Men spend more (40%) and 2-17 year olds spend less (28%), of their TV week with Canadian programming.

2) There are only two program types that have a large Canadian programming viewership component... Current Information and Live Sports. If a demographic group devotes a large part of their week viewing these two program types (Men 18+), they will spend a large proportion of their TV week with Canadian programming. If a group tends not to view these two program types (2-17 year olds) they will spend little of their TV time with Canadian programming.

3) If barriers exist in a region, that reduces TV viewing options, that region's population will spend a larger share of their TV time with Canadian programming. The barrier could be language in the case of Quebec French or it could be reception in the case of Saskatchewan and the Maritime provinces.

4) The act of increasing TV viewing options in a region, will have the effect of reducing the amount of Canadian program viewed. A perfect test case for this phenomena is Saskatchewan which, in '84, registered a large Canadian programming share of TV tuning. The recent delivery of Detroit US signals, and the licensing of a third TV system will drive down the Canadian programming viewing ratios to levels similar to BC.

5) If the Canadian late evening news and information TV schedules, that usually air 10:00pm to 11:30pm EST, are delayed due to time zone differences in a region, that region will experience a significant reduction in it's Canadian programming viewing level. Women 18+ in Newfoundland would devote about 40% of their TV viewing time to Canadian programming if that region received the CTV schedule earlier.

6) Televised Drama programming, which includes Sentimental and Other Drama, accounts for about 40% of all TV viewing activity. The viewing to this program type is almost entirely non-Canadian. Canadians will continue to allocate the bulk of their TV tuning to non-Canadian programming as long as the Drama program type remains the origination domain of the US.

7) The Entertainment program type, which accounts for about 10% of weekly tuning, does have a substantial Canadian programming component... 43%. In the short term this appears to be the program type that could attract an even greater degree of tuning to Canadian programming.

8) The appeal of non-Canadian programming is evidenced by the fact that the English CBC O+O plus Affiliates system has the largest national reach of Men and Women, but only a third rank share of tuning position. This is directly attributable to the relatively high level of tuning to Canadian programming on CBC O+O and CBC Affiliates.

9) The share of TV time directed to Canadian programming has remained constant between Fall of '82 and the Fall of '84.

10) There has been some degree of tuning shifting between TV systems over this time frame. Generally in French Canada, TV systems that increased their proportion of tuning to Canadian programming, increased their shares of total tuning. In English Canada the reverse has been true. The TV systems that had a larger Canadian tuning proportion in '84 vs '82, experienced declines in their share of total TV tuning. There is motivation for French language TV systems to schedule Canadian programming, yet there exists a major disincentive for English language Telecasters to provide Canadian programming... decline in tuning shares leading to decline in ad revenues.

11) Canadian programming is technically available to all in Canada. The low shares of tuning produced by Canadian programming is not due to lack of availability. Canadian programming reaches 95% of Women 18+ each week. Current Information programming reaches 89% of Women weekly.

12) Low shares of tuning to Canadian programming can not be totally attributable to the existence of US Commercial TV signals. Two western provinces have similar below average degrees of Women 18+ tuning to Canadian programming... BC (30%) and Manitoba (32%). In BC, US Commercial captures 31% of all TV tuning. In Manitoba, US Commercial only captures 18% of weekly Women hours of tuning. The high share of tuning in Manitoba that is directed to the English Independent (23%) creates the viewing options necessary to drain hours away from Canadian programming.

13) If one TV system alone, of many available to an audience in a given region, increases the hours of Canadian programming in it's schedule to a very high level, in an attempt to increase the proportion of tuning time Canadians spend with Canadian programming, that system will lose share of tuning to it's low Canadian content competitors. There would be little growth in tuning to Canadian programming as a result. Only if this system was one of a few available to Canadians in a region, would there be significant growth in the share of tuning to Canadian programming.

14) The Global and English Independent TV systems have relatively low proportions of their viewing bases directed towards Canadian programming. The development of these two systems Ontario/West, provide tuning options in these regions, draining hours of tuning from the CBC O+O system and indirectly producing the low degree of tuning to Canadian programming in this part of the country.

15) The TVO/Knowledge Network TV system is the only system that experiences larger Canadian programming tuning ratios for 2-17 year olds than for Women or Men 18+. All other systems have lower 2-17 year old tuning proportions of tuning to Canadian programming. The TVO/KN have Women and Men Canadian tuning ratios that are similar to the national averages. Dramatic expansion of these systems, say to areas of the country other than Ontario or BC, would have little effect on national tuning levels to Canadian programming for Men and Women 18+, and a marginal increase in national tuning levels to Canadian programming for 2-17 year olds.

16) US TV systems, which includes US Commercial, US PBS and a portion of Pay-TV, capture between a high of 27% of TV tuning in Canada (2-17 year olds) to a low of 23% of TV tuning in Canada (Men 18+). The practice of Simulcasting maintains a ceiling on the shares of tuning the US systems can capture. If Canadian TV systems were in some way regulated to carry larger quantities of Canadian programming, the US systems would probably experience larger shares of tuning for two reasons... the incidences of Simulcasting would be reduced and in a way the US Commercial stations would replace the English Independents and Global as the supplier of "alternate" programming and become the true tuning option.

These 16 points summarize the main Canadian programming findings from this study. The points highlight the delicate balance of tuning that exists in the country and hints at the "action/re-action" dynamics that could take place if various forces were brought to bare upon the Canadian Broadcasting system.

The key conclusion from this study, is that English language Canadian Drama tends to be unpopular. There are of course dramatic exceptions but generally when non-Canadian Drama is scheduled against Canadian Drama, the viewer moves to the popular... non-Canadian.

The base TV system in Canada, CBC O+O and Affiliates, contains a large degree of Canadian programming content and this translates into a distinctive Canadian tuning ratio for the CBC. Different parts of English Canada have different numbers of layers of TV tuning options with lower levels of Canadian content and lower Canadian programming tuning ratios. As tuning options increase, the variety of non-Canadian programming increases, the more tuning to non-Canadian programming takes place and the CBC share of tuning drops.

Cut off tuning options from a region and the CBC's share of tuning grows and the tuning becomes more Canadian in nature.

Increase the amount of Canadian content on the Canadian TV systems in competition with the CBC, and the US Commercial system becomes "the" tuning option.. it's share of tuning will increase and the Canadian TV systems will suffer erosion in ad revenue.

Do all of this and cut off the US Commercial signals and the Canadian cable industry becomes seriously threatened and Canadians bemoan the fact they have no "popular" TV programming available.

Expand TVO/Knowledge Network to all parts of the home provinces and even expand to all parts of the country and little in terms of viewing Canadian programming changes.

This study, in conclusion, suggests that there does not appear to be anything short of major surgery that can be done to the Canadian Broadcasting system's structure or distribution pattern that can produce major increases in tuning to Canadian programming. The only way Canadians can be made to view more programming with Canadian origination is by creating an economic environment that allows the production Canadian programming that is more popular than non-Canadian programming and ensuring deep distribution.

2+ Exhibits

The following exhibits were created
for the Task Force following the preparation
of the final report.

PORTION OF TV VIEWING TO
CDN PROGRAMMING
1982-1984, ALL PERSONS 2+

SYSTEM	1984	1983	1982
CBC FR O+O	72%	67%	62%
RADIO QUEBEC	72%	72%	82%
CBC FR AFFILIATE	60%	57%	51%
CBC ENG O+O	65%	61%	62%
TVA AFFILIATE	52%	62%	60%
CBC AFFILIATE	46%	42%	41%
CTV AFFILIATE	37%	35%	34%
TVO/KNOW.NET.	39%	39%	36%
GLOBAL.	32%	31%	29%
ENG INDEPT.	27%	24%	23%
US PBS	5%	3%	0%
US COMMERCIAL	5%	2%	1%
PAY TV	1%	0%	NA

PORTION OF TV VIEWING TO CDN PROGRAMMING
1984
WOMEN 18+ vs ALL PERSONS 2+

W18+		AP 2+	
SYSTEM RANKED FROM MOST TO LEAST CDN PGMING		SYSTEM RANKED FROM MOST TO LEAST CDN PGMING	
CBC FR O+O	77%	CBC FR O+O	72%
RADIO QUEBEC	72%	RADIO QUEBEC	72%
CBC FR AFFILIATE	64%	CBC ENG O+O	65%
CBC ENG O+O	63%	CBC FR AFFILIATE	60%
TVA AFFILIATE	53%	TVA AFFILIATE	52%
CBC AFFILIATE	45%	CBC AFFILIATE	46%
CTV AFFILIATE	36%	TVO/KNOW.NET.	39%
TVO/KNOW.NET.	35%	CTV AFFILIATE	37%
GLOBAL.	30%	GLOBAL.	32%
ENG INDEPT.	23%	ENG INDEPT.	27%
US PBS	5%	US COMMERCIAL	5%
US COMMERCIAL	4%	US PBS	5%
PAY TV	1%	PAY TV	1%